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United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

Circular Series

SG 8-89

November 1989

# USSR Grain Situation and Outlook

The Soviet grain crop estimate was increased 3 million tons to 208 million tons based on reported preliminary Republic level yields and official Soviet statements. Coarse grain production is now forecast at 105.5 million tons, up 2.5 million, and miscellaneous grains at 13.5 million, up 0.5 million. The wheat production estimate is unchanged at 89 million tons. Total estimated area remains unchanged at 111.5 million hectares.

## FALL SEEDING PROGRESS LAGGING

Autumn planting and plowing this year have continued to lag behind progress made in 1988. Seeding of winter crops, over 85 percent of which are generally grains sown for grain, was nearly 2 million hectares below last year's level as of October 9. Winter wheat usually accounts for about 60 percent of the total winter grain area seeded in the USSR.

### USSR: Winter Crop Seeding Progress 1/

	1987 2/	1988 2/	1989
	Million Hectares		
August 28	NA	13.1	11.0
September 11	22.0	23.3	20.4
October 2	32.6	35.8	33.7
October 9	NA	37.3	35.5

1/ Winter crops include winter grains for grain, grains for feed, winter rapeseed. Winter grains include wheat, rye and barley.

2/ Interpolated by ERS.

## WEATHER AND CROP DEVELOPMENTS

In the European USSR, winter grain planting was nearly complete in early October, while corn harvesting continued throughout the month. Unseasonably warm weather covered winter grain areas in October, promoting continued vegetative growth. Above-normal precipitation over the upper Volga, the northern Black Soils Region, and the Central Region reversed September's unfavorably dry weather pattern in these areas, improving conditions for winter grain establishment. Although precipitation over most of the Ukraine and the North Caucasus was above normal, periodic dryness prevented significant delays in corn harvesting.

Since the beginning of November, unseasonably mild weather and widespread light to moderate precipitation favored winter grain establishment. Winter grains in the Central Region, the Volga Vyatsk Region, and the upper Volga began entering dormancy about 2 weeks later than usual. Overall, adequate moisture and mild weather since planting have provided favorable conditions for emergence and establishment of the 1990 winter grain crop.

#### IMPORT ESTIMATE INCREASED

The estimate of USSR grain imports for 1989/90 has been increased to 37 million tons, up 3 million tons from the month-earlier estimate and only slightly below 1988/89. The disappointing level of late-season grain procurements combined with a recent surge in purchases pointed to higher imports than earlier forecast.

Recent heavy purchases of U.S. corn for near by delivery have pushed total USSR coarse grain purchases from all origins to over 12 million tons. Earlier in the marketing year the USSR had also purchased Canadian and EC barley for fall delivery. The recent wave of purchases along with reports from the USSR that this year's forage harvest and procurements of grain may not be up to earlier expectations has prompted an increase in the estimate of 1989/90 coarse grain imports to 24 million tons. Corn is expected to account for over 80 percent of the USSR 1989/90 coarse grain imports. Reflecting a shortfall in Chinese corn shipments to the USSR, the estimate of 1988/89 coarse grain imports has been reduced to 23 million tons.

The estimate of USSR wheat imports holds at 12 million tons. So far the USSR appears to have covered only around 2.5 million tons of their 1989/90 import requirements. The pace of wheat purchases has been extremely slow with sales from all origins as of early November estimated to be less than half the recent average for this date. However, with grain agreements or trading arrangements covering a significant portion of projected trade, it seems likely that wheat purchases will pick up after the Soviets appraise the level of procurements from this year's crop which to date have been running well below expectations.

#### SOVIET UNION CLEARED TO BUY MORE GRAIN

The United States announced on October 25, 1989, that the purchase level which would trigger consultations under the extended U.S.-USSR Grain Agreement has been increased from 12 million tons to 16 million tons for 1989/90. Under the agreement, Soviet purchases of U.S. wheat and corn for shipment during the 12-month period which began October 1 can increase to a total level of 16 million tons without further consultations or communications.

#### DOMESTIC USE INCREASED

Reflecting recent statements by Soviet officials and adverse weather during harvest in the European USSR, the estimate of dockage and waste has been increased to 12 percent of the 1989 crop or 25 million tons. The estimate of actual grain utilization including seed, industrial use, food, and feed continues at 218 million tons. Grain stocks will likely be added too as areas hold more grain on farms due to inadequate incentives to sell to the State.

## FERTILIZER DELIVERIES CONTINUE DECLINE

Soviet fertilizer deliveries to farms have continued to decrease in 1989, having fallen about 1 percent last year. Fertilizer deliveries as of the end of September were running 7 percent behind deliveries for the same period in 1988. Increased State prices for inputs appear to account largely for the decrease in farm fertilizer purchases.

### USSR: Deliveries of Mineral Fertilizers

	1986	1987	1988	1989
	Million tons			
Jan.-Sept.	NA	NA	21.1	19.7
Jan.-Dec.	26.5	27.4	27.1	NA

Source: Pravda, 29 October 1989, p.3.

## FODDER SUPPLIES DOWN AGAIN

As of October 2, Soviet roughage supplies and quality were slightly less than last year on this same date. Reportedly, only the Russian Republic, Latvia, and Estonia had more feed per standard animal unit compared to 1988. An improved Soviet potato crop in 1989 may partly alleviate the tight feed situation.

### USSR: Fodder supplies on State and collective farms, Oct. 2

	1988	1989
	Million tons	
Feed units 1/	135.2	133.8
	Tons/head	
Feed per standard animal unit	1.53	1.52

1/ Sown roughage crops and straw in oat-unit equivalent.

Source: Pravda, 29 October 1989, p.3.

USSR Grain Area, Yield, and Production  
1975-1988, and 1989 (Projected)

Grain	Area ( <u>Million Hectares</u> )	Yield (Metric Tons) ( <u>Per Hectare</u> )	Production <sup>1/</sup> (Million) ( <u>Metric Tons</u> )
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Projected)	47.5	1.87	89.0
<u>Coarse Grains <sup>2/</sup></u>			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Projected)	55.5	1.90	105.5
<u>Total Grain <sup>3/</sup></u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Projected)	111.5	1.87	208.0

<sup>1/</sup> "Bunker weight" basis; not discounted for excess moisture or foreign material.

<sup>2/</sup> Includes rye, barley, oats, corn, sorghum, and millet.

<sup>3/</sup> Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1989/90

Year	Production	Trade (Jul/Jun)		Availability 1/ July/June	Total 1/ (Million Metric Tons)				Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
		Imports	Exports		Seed	Industrial	Food				
1975/76	140.1	26.1	0.7	166	Total Grains 4/ 178				14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88	211.4	32.0	0.5	243	239	25	5	47	30	132	+4
1988/89 5/	195.1	39.0	0.5	234	235	25	5	48	22	135	-1
Projected 1989/90	208.0	37.0	1.0	244	243	25	5	48	25	140	+1
1975/76	66.2	10.1	0.5	76	Wheat 86				7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88	83.3	21.5	0.5	104	101	11	1	36	13	40	+3
1988/89 5/	84.4	15.5	.5	99	100	11	1	37	10	41	-1
Projected 1989/90	89.0	12.0	1.0	100	99	11	1	37	11	39	+1
1975/76	65.8	15.6	—	81	Coarse Grains 83				6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	4	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	—	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	—	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	—	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	—	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	—	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	—	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	—	114	114	12	4	7	9	82	—
1986/87	105.9	11.0	—	117	115	13	4	7	11	80	+2
1987/88	113.7	10.0	—	124	123	13	4	7	15	84	+1
1988/89 5/	97.5	23.0	—	121	121	13	4	7	11	86	—
Projected 1989/90	105.5	24.0	—	130	130	13	4	7	12	94	—

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Coarse Grain Production  
1981-89

	Barley	Rye	Corn	Oats	Other	Total
	Million Tons					
1981/82	36.1	9.6	9.6	12.4	1.8	69.4
1982/83	43.0	14.8	14.7	16.8	2.5	91.8
1983/84	50.0	17.3	13.3	18.8	2.5	101.9
1984/85	41.8	14.0	13.6	19.2	1.9	90.5
1985/86	46.5	15.7	14.4	20.5	2.9	100.0
1986/87	53.9	15.2	12.5	21.9	2.4	105.9
1987/88	58.4	18.1	14.8	18.5	3.9	113.7
1988/89	44.5	18.5	16.0	15.3	3.2	97.5
1989/90 Proj.	49.0	21.0	16.0	16.0	3.5	105.5

USSR Coarse Grain Imports  
July-June 1981/82 - 1989/90

	Barley	Rye	Corn	Oats	Sorghum	Total
	Million Tons					
1981/82	4.3	.6	17.7	---	3.4	26.0
1982/83	2.1	.1	7.4	---	2.9	12.5
1983/84	.9	---	8.7	---	2.0	11.6
1984/85	4.4	.4	20.3	.3	1.5	26.9
1985/86	2.4	.1	10.4	.2	.6	13.7
1986/87 Prel.	3.7	.1	7.1	---	.1	11.0
1987/88 Prel.	2.5	.1	7.3	.1	---	10.0
1988/89 Prel.	3.2	.1	18.6	.1	1.0	23.0
1989/90 Proj.	3.4	.1	19.5	.2	.8	24.0

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Circular Series

SG 7-89

October 1989

5

# USSR Grain Situation and Outlook

USDA's estimate of the 1989 Soviet grain crop was increased this month by 5 million tons to 205 million, based primarily on published preliminary yield results. Preliminary yields, excluding corn, from several key areas in European USSR and most recently from Kazakhstan have indicated a crop slightly better than previously forecast. The estimate of wheat production was raised by 2 million tons to 89 million; coarse grains were raised by 3 million tons to 103 million. No change was made in USDA's area estimate.

## WEATHER AND CROP DEVELOPMENTS

In the European USSR, corn was harvested during September while winter grain planting advanced southward. Following above-normal August precipitation over the Baltic States and Belorussia, drier weather in September benefited fieldwork for late spring grain harvesting and winter grain planting. Dry weather continued in the southwestern portion of the Central Region, the northeastern Black Soils Region, the southern Volga Vyatsk Region, and adjacent areas of the Volga Valley, creating unfavorable conditions for winter grain emergence and early plant establishment. In the Ukraine and most of the North Caucasus, moderate to locally heavy rain during September 1-12 produced above-normal precipitation and increased pre-planting topsoil moisture for winter grains. Dry weather returned to these areas on September 13 and continued until September 26, helping corn harvest and winter grain planting. Since September 26, widespread rain over most of European USSR caused some delays in corn harvesting and a cooling trend slowed emergence and early growth of winter grains. On October 7, minimum temperatures were below freezing as far south as the southern Ukraine, ending the growing season for this year's crops.

In spring grain areas east of the Ural mountains, well-below-normal precipitation in September covered most of the southern Urals, Kazakhstan, West Siberia, and East Siberia, creating excellent conditions for spring grain harvesting. Some harvest delays may have occurred, however, in extreme northern crop areas, where periodic showers produced above-normal rainfall.

## IMPORT ESTIMATE REDUCED

Reflecting improved prospects for the 1989 grain crop and the reduced rate of grain purchases, the estimate of USSR grain imports for the 1989/90 marketing year was reduced by 2 million tons to 34 million. The estimates of wheat and coarse grain imports were each reduced by a million tons to 12 million and 21 million, respectively. Rice, pulses, and miscellaneous grains account for the balance.

Some of the uncertainty surrounding the 1989/90 USSR grain import program was eliminated over the past 2 weeks as USSR grain buyers purchased nearly 4 million tons of U.S. corn, and reportedly over a million tons of European Community barley and small amounts of Canadian barley. Most of this grain is expected to be shipped over the next 3 months. However, even with this recent flurry of activity, total USSR coarse grain purchases at around 6 million tons are still less than a third of their projected 1989/90 import requirements. Recent market reports indicate that the Soviets have requested that sellers offer 90-120 day credit on current grain sales. It appears that the bulk of the recent corn sales and some of the barley sales were made under these credit terms, permitting the Soviets to delay payment until after January 1, the start of their new fiscal year.

Over the past month, the USSR grain buying agency has reportedly shown little interest in purchasing wheat. Apparently, Canada and the USSR have yet to come to terms on any significant wheat trade for 1989/90. The USSR still has to purchase about 10 million tons of Canadian grain over the August 1989-July 1991 period to fulfill the grain agreement with Canada. Wheat has normally accounted for over 80 percent of Canada's grain shipments to the USSR.

The pattern of USSR wheat purchases has been highly unusual during 1989/90 with total commitments from all origins estimated at between 1-2 million tons. This is likely the slowest pace of wheat purchases since the USSR joined the ranks of major importers. A number of factors may be contributing to the lack of wheat purchases. More milling quality wheat has been sold to the State this year than last, reducing the need for wheat imports. Unlike some recent years, no feed-quality wheat imports are anticipated in 1989/90, due to high wheat prices relative to corn. Lack of buying to date is also probably tied to the new program of hard-currency payments for above-quota sales of wheat to the State. Allocation of funds for wheat imports may be delayed until the results of this program are known. Domestic wheat procurements usually wind down by November.

#### U.S.-USSR LTA Trade

Under the terms of the Long Term Grain Agreement (LTA) between the 2 countries, the USSR must purchase a minimum of 4 million tons of U.S. wheat and 4 million of U.S. corn for shipment during October-September 1989/90.

Based on recent reports, USSR corn purchases for October-September 1989/90 are already approaching, if not in excess of, 4 million tons. In addition, the USSR has already purchased 250,000 tons of U.S. soybean meal. As of early October, no U.S. wheat had been reported sold to the USSR for 1989/90.

#### U.S. Exports to the USSR October-September 1,000 tons

	<u>1986/87</u>	<u>1987/88</u>	<u>1988/89</u>	<u>1989/90 1/</u>
Wheat	4,081	9,046	5,395	---
Corn	4,102	5,528	16,330	3,700
Soybeans/meal	68	2,151	1,648	250

1/ Sales to date

### Domestic Use Estimate Unchanged

The estimate of USSR domestic grain utilization, including an estimate for dockage and waste, continues at 240 million tons. The 5-million-ton increase in the 1989 crop estimate has been accommodated by a 2-million-ton decline in the import projection and a reduction in the projected total stock drawdown from 5 million tons to only 2 million.

USSR Grain Area, Yield, and Production  
1975-1988, and 1989 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production <sup>1/</sup> (Million) (Metric Tons)
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
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1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Projected)	55.5	1.86	103.0
<u>Total Grain <sup>3/</sup></u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Projected)	111.5	1.84	205.0

<sup>1/</sup> "Bunker weight" basis; not discounted for excess moisture or foreign material.

<sup>2/</sup> Includes rye, barley, oats, corn, sorghum, and millet.

<sup>3/</sup> Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

Year	Production	Trade (Jul/Jun)		Availability 1/ July/June		Total 1/ Seed (Million Metric Tons)		Industrial	Food	Dedage/ Waste 2/ Feed	Stock Change 3/ July/June
		Imports	Exports								
1975/76	140.1	26.1	0.7	166	Total Grains 4/ 178		25	5	45	14	89
1976/77	223.8	11.0	3.3	232	220	26	26	5	45	31	+12
1977/78	195.7	18.9	2.3	212	229	26	26	5	45	29	-16
1978/79	237.4	15.6	2.8	250	230	25	25	6	46	28	+20
1979/80	179.2	31.0	0.8	209	223	26	26	6	46	22	-14
1980/81	189.1	34.8	0.5	223	224	25	25	6	46	28	-1
1981/82	158.2	47.3	0.5	205	211	25	25	5	47	16	-6
1982/83	186.8	34.3	0.5	221	214	25	25	5	47	19	+7
1983/84	192.2	32.5	0.5	224	218	26	26	5	47	21	+6
1984/85	172.6	55.5	0.5	228	219	24	24	6	47	19	+9
1985/86	191.7	29.9	0.5	221	220	24	24	5	47	18	+1
1986/87	210.1	27.5	0.5	237	230	25	25	5	47	23	+7
1987/88	211.4	32.0	0.5	243	239	25	25	5	47	30	+4
1988/89 5/ Projected 1989/90	195.1 205.0	39.5 34.0	0.5 1.0	234 238	235 240	25 25	25	5 5	48 48	22 22	-1 -2
Wheat											
1975/76	66.2	10.1	0.5	76	86	13	13	1	35	7	-10
1976/77	96.9	4.6	1.0	100	92	13	13	2	35	14	+8
1977/78	92.2	6.6	1.0	98	109	14	14	2	35	14	-11
1978/79	120.9	5.1	1.5	124	107	13	13	2	35	14	+18
1979/80	90.2	12.0	0.5	102	114	13	13	2	35	11	-12
1980/81	98.2	16.0	0.5	114	113	13	13	2	35	15	+1
1981/82	81.1	20.3	0.5	101	104	11	11	2	36	8	-3
1982/83	84.3	20.8	0.5	105	101	11	11	2	36	9	+4
1983/84	77.5	20.5	0.5	98	93	11	11	2	36	9	+4
1984/85	68.6	28.1	0.5	96	91	11	11	2	36	8	+5
1985/86	78.1	15.7	0.5	93	92	11	11	1	36	8	+1
1986/87	92.3	16.0	0.5	108	103	11	11	1	36	10	+5
1987/88	83.3	21.5	0.5	104	101	11	11	1	36	13	+3
1988/89 5/ Projected 1989/90	84.4 89.0	15.5 12.0	0.5 1.0	99 100	100 102	11 11	11	1 1	37 37	10 10	-1 -2
Coarse Grains											
1975/76	65.8	15.6	—	81	83	11	11	4	7	6	-2
1976/77	115.0	5.7	2.0	119	115	11	11	3	7	16	+4
1977/78	92.6	11.7	1.0	103	108	10	10	3	7	14	-5
1978/79	105.4	10.0	1.0	114	112	10	10	4	7	13	+2
1979/80	81.2	18.4	—	100	102	12	12	4	7	10	-2
1980/81	80.5	18.0	—	98	101	12	12	4	7	12	-2
1981/82	69.3	26.0	—	95	98	13	13	3	7	7	-3
1982/83	91.8	12.5	—	104	101	13	13	3	7	9	+3
1983/84	101.9	11.5	—	113	112	13	13	3	7	11	+2
1984/85	90.5	26.9	—	117	114	12	12	4	7	10	+4
1985/86	100.0	13.7	—	114	114	12	12	4	7	9	—
1986/87	105.9	11.0	—	117	115	13	13	4	7	11	+2
1987/88	113.7	10.0	—	124	123	13	13	4	7	15	+1
1988/89 5/ Projected 1989/90	97.5 103.0	23.5 21.0	— —	121 124	121 124	13 13	13	4 4	7 7	11 10	— —

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/  
By Country of Origin by Months  
(1,000 Tons)

	<u>U.S.</u>	<u>Canada</u>	<u>Australia</u>	<u>EC</u>	<u>Argentina</u>	<u>Sub Total</u>	<u>Total 2/</u>
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452	765	5,117	
May	1,840	777	123	1,050	412	4,202	
June	193	11	13	150	40	407	
April-June	3,786	1,806	265	2,652	1,217	9,726	12,400
July	1,915	---	---	59	10	1,984	
August	1,064	---	---	---	---	1,089	
September	316	74	---	---	---	415	
July-September	3,295	74	---	59	10	3,488	4,600
October	---	872	---	540	---	1,422	
November	525	357	---	708	---	1,607	
December	1,703	332	---	435	---	2,485	
October-December	2,228	1,561	---	1,683	---	5,514	6,500
January 1988	1,852	72	---	647	---	2,571	
February	1,746	93	---	764	135	2,738	
March	2,255	101	---	924	486	3,766	
Jan-March	5,853	366	---	2,335	621	9,075	10,000
April	2,406	713	---	275	332	3,726	
May	1,995	1,123	---	180	6	3,304	
June	755	898	---	235	---	1,888	
April-June	5,156	2,734	---	690	338	8,918	10,400
July	375	131	---	53	35	594	
August	804	---	---	15	175	994	
September	344	126	---	1	4	475	
July-September	1,523	257	---	69	214	2,063	2,600
October	1,935	524	---	480	264	3,203	
November	1,529	341	15	1,011	114	3,010	
December	1,585	261	---	1,422	47	3,315	
October-December	5,049	1,126	15	2,913	425	9,528	10,800
January 1989	2,234	316	---	633	43	3,226	
February	2,631	172	---	861	23	3,687	
March	3,115	81	---	954	202	4,352	
Jan-March	7,980	569	---	2,448	268	11,265	12,100
April	2,105	371	80	1,500 3/	182	4,238	
May	3,061	351	104	650 3/	221	4,387	
June	2,752	60	66	450 3/	66	3,394	
April-June	7,918	782	250	2,600 3/	469	12,019	13,500
July	1,286	49	---	25 3/	---	1,360	
August	376	---	---	N/A	---	376	

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

USSR Imports of Wheat and Coarse Grains by Source 1975/76-1988/89  
July/June Years  
(Million Tons)

	1975/76	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	Prelim. 1988/89
<b>Wheat</b>														
U.S. 1/	4.0	2.9	3.3	2.9	3.9	3.0	6.9	3.0	4.4	6.1	.2	.8	12.3	4.6
Canada	3.2	1.2	1.7	2.0	2.1	4.5	4.8	7.0	5.8	7.6	4.8	5.9	4.4	2.7
Australia	1.2	.4	.3	.1	2.7	2.5	2.4	1.0	1.6	2.1	3.2	1.3	.3	.2
Argentina	1.2	.1	1.1	--	2.0	3.0	3.1	4.2	3.6	4.1	.7	.6	.6	.6
EC	--	--	--	--	.7	.9	1.7	3.4	3.6	6.1	5.2	6.2	3.1	4.8
Others	.4	--	.2	.1	.6	2.1	1.4	2.2	1.5	2.1	1.6	1.2	.8	2.6
TOTAL*	10.1	4.6	6.7	5.1	12.1	16.0	20.3	20.8	20.5	28.1	15.7	16.0	21.5	15.5
<b>Coarse Grains</b>														
U.S. 1/	9.9	4.5	9.2	8.3	11.3	5.0	8.5	3.2	6.0	16.2	6.8	4.1	4.2	17.7
Canada	1.3	.2	.2	.1	1.3	2.3	4.4	1.8	.5	.0	.7	2.2	.3	--
Australia	.8	.1	--	--	1.3	.4	.1	--	.1	1.1	--	--	--	--
Argentina	.2	.2	1.6	1.4	3.1	8.2	10.2	5.4	3.3	3.9	1.3	1.4	.4	.8
EC	.5	.2	.2	.2	.2	.6	.7	.3	.2	2.7	1.6	1.5	2.1	3.2
Others	2.6	.3	.6	--	1.2	1.5	2.1	1.8	1.5	2.3	3.3	1.8	3.0	1.8
TOTAL*	15.6	5.7	11.7	10.0	18.3	18.0	26.0	12.5	11.6	26.9	13.7	11.0	10.0	23.5
<b>Total</b>														
U.S. 1/	13.9	7.4	12.5	11.2	15.2	8.0	15.4	6.2	10.4	22.3	7.0	4.9	16.5	22.3
Canada	4.5	1.4	1.9	2.1	3.4	6.8	9.2	8.8	6.3	8.3	5.5	8.1	4.7	2.7
Australia	2.0	.5	.3	.1	4.0	2.9	2.5	1.0	1.7	3.2	3.2	1.3	.3	.2
Argentina	1.4	.3	2.7	1.4	5.1	11.2	13.3	9.6	6.9	8.0	2.0	2.0	1.0	1.4
EC	.5	.2	.2	.2	.9	1.5	2.4	3.7	3.8	8.8	6.8	7.7	5.2	8.0
Others	3.0	.3	.8	.1	1.8	3.6	3.5	4.0	3.0	4.4	4.9	3.0	3.8	4.4
TOTAL *	25.7	10.3	18.4	15.1	30.4	34.0	46.3	33.3	32.1	55.0	29.4	27.0	31.5	39.0

-- Denotes less than 50,000 tons.

\* Totals may not add due to rounding. Excludes rice and pulses. Included grain equivalent of flour.

1/ U.S. exports based upon Export Sales data, which normally include transshipments whereas Census data may not.

SOURCE: Based on reports of countries exporting to the USSR.

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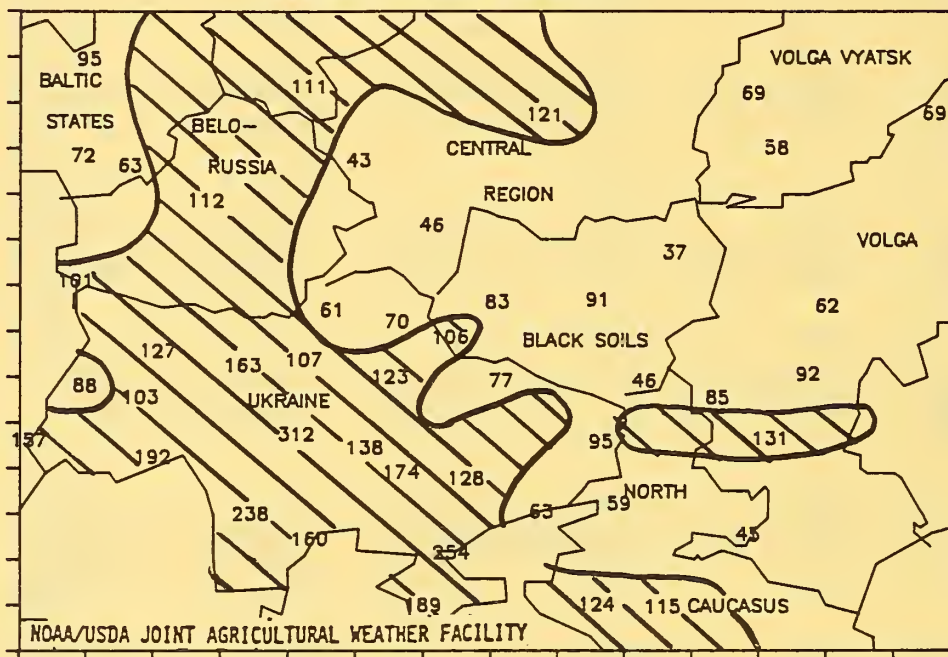
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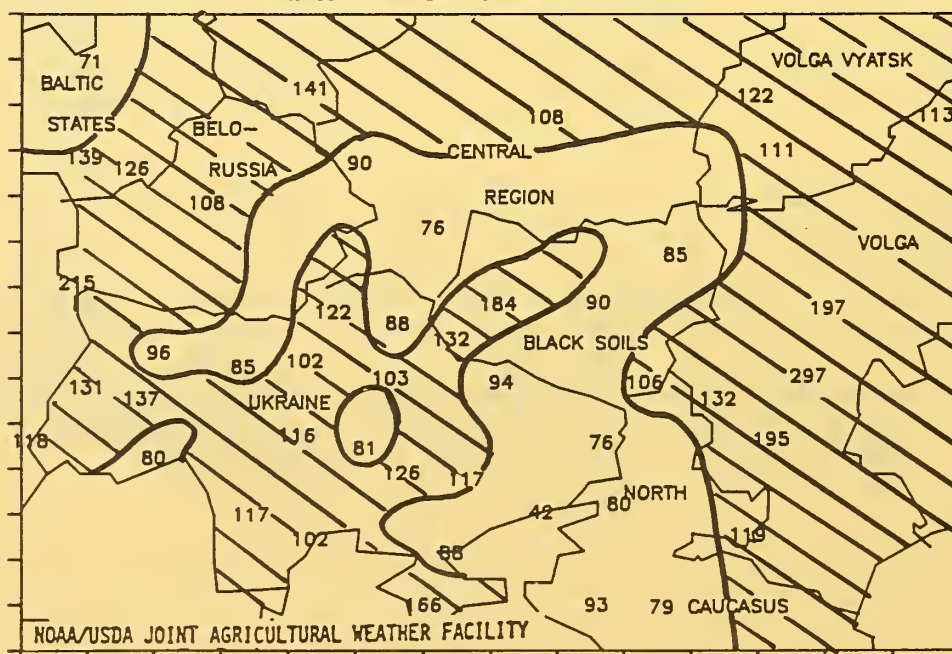
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PERCENT OF NORMAL PRECIPITATION





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Circular Series

SG 6-89

September 1989

# USSR Grain Situation and Outlook

## USSR GRAIN CROP ESTIMATE UNCHANGED

The 1989 Soviet grain crop estimate remains unchanged at 200 million tons, including 87 million tons of wheat, 100 million coarse grains and 13 million miscellaneous grains and pulses. The total grain area estimate remains at 111.5 million hectares. Although an official Soviet total grain production number has yet to be announced, several European oblasts have published preliminary yields indicating a much better crop than last year, while many areas east of the Urals are reportedly doing much worse than last year.

Nearly three-quarters of the Soviet small grain area was reportedly threshed by the end of August. The overall pace of harvesting caught up with last year's rapid progress, with 79.9 million hectares cut and 76.5 million threshed as of August 28. Winter crops were sown on 11 million hectares, as of this same date.

## USSR HARVESTING PROGRESS OF SMALL GRAINS AND PULSES 1/

1986 Crop			1987 Crop		1988 Crop		1989 Crop	
Cut Threshed			Cut Threshed		Cut Threshed		Cut Threshed	
Million Hectares								
Aug 7	45.3	NA	33.9	27.6	51.5	48.2	48.0	44.5
Aug 14	53.9	50.3	45.5	38.6	61.0	57.6	57.2	53.4
Aug 21	61.3	57.0	58.2	49.3	70.3	65.8	NA	64.4
Aug 28	71.3	65.3	71.2	60.8	80.3	75.7	79.9	76.5

1/ Excluding corn for grain; state and collective farms only.

## WEATHER AND CROP DEVELOPMENTS

In the European USSR, well below-normal precipitation in August over the eastern two-thirds of the Ukraine and the North Caucasus helped the small grain harvest. While adequate soil moisture reserves favored filling corn in the North Caucasus, soil moisture was limited in the southern Ukraine where dry weather persisted since early July. Below-normal August precipitation in the Volga Valley reversed July's wet weather pattern, improving conditions for drydown of spring grains and for harvest. Since September 1, moderate to heavy rain covered most of the Ukraine and the North Caucasus, providing abundant topsoil moisture for planting the 1990 winter grain crop. However, the persistent rain delayed early corn harvesting and caused local flooding.

During August, unseasonably warm dry weather continued over Kazakhstan and West Siberia. Although the dry weather helped early spring harvesting in Kazakhstan, it stressed filling spring grains in the eastern portion of West Siberia. Since September 1, continued dry weather over most spring grain areas helped harvesting. The season's first widespread frost covered spring grains in the northern Urals and the western portion of West Siberia on September 2, about 1 week earlier than normal. However, minimum temperatures ranging from -2 to 1 degrees Celsius had minimal effect on mature spring grains.

#### USSR GRAIN IMPORT ESTIMATE UNCHANGED

The estimate of USSR grain imports for 1989/90 is unchanged from a month ago at 36 million tons, including 22 million tons of coarse grains, 13 million tons of wheat with the balance rice, pulses and miscellaneous grains.

USSR grain buying activity continues to run below expectations. A number of factors may be contributing to this, including continued prospects for a relatively good 1989 USSR grain harvest and recent organizational developments which may have affected the import decision process.

The low level of USSR grain imports so far during the 1989/90 marketing year and the modest level of forward purchases raises some questions as to whether or not total grain imports will reach 36 million tons. However, in recent years the USSR has proven that they can maintain a heavy import program through the winter months and well into the spring. Last year, USSR grain imports during the last 9 months of the marketing year totaled around 33 million tons. In 1984/85, when total USSR grain imports reached an all-time high of over 55 million tons, imports during the last 9 months of the marketing year totaled over 40 million.

USSR wheat imports for the 1989/90 marketing year are currently projected at 13 million tons. Based on recent reports it appears that the USSR has covered less than a third of its 1989/90 wheat imports. Soviet wheat purchases from the major suppliers have been slow to develop in 1989/90. U.S. sales of around 800,000 tons have been on the books for some time. The EC sales program to the USSR apparently is in the works but nothing has been reported to date. The high quality of this year's EC wheat harvest may mean that the EC captures a larger than normal share of the USSR milling wheat market. The major southern hemisphere suppliers, Argentina and Australia, have about exhausted old crop supplies, so any significant sales will have to await new crop availability. Earlier reports of large Canadian wheat sales to the USSR have yet to be confirmed. Canada is expected to be a major wheat supplier to the USSR in the current marketing year as it still has around 10 million tons of grain to ship during the last 2 years of the grain agreement with the USSR. In recent years, wheat has accounted for over 80 percent of Canada's grain shipment to the USSR. The bulk of the USSR's 1989/90 wheat imports is expected to be milling wheat as prices for feed wheat are not likely to be competitive with corn and barley prices.

USSR grain buyers appear to have covered less than 10 percent of their 1989/90 coarse grain imports. The United States with sales of close to 1 million tons has been the only significant seller. Corn is expected to again dominate USSR coarse grain imports. In recent years, corn has, on average, accounted for around three-fourths of USSR coarse grain imports.

#### DOMESTIC USE ESTIMATE UNCHANGED

The estimate of USSR grain utilization for 1989/90 is unchanged from a month ago. Actual grain use is currently estimated at a record high 218 million tons. Higher feed use accounts for all of the increase from a year ago. The allowance for dockage and waste in the 1989 grain crop continues at 22 million tons or around 11 percent of the total crop. With total utilization forecast to exceed the 1989 crop, the USSR is expected to draw down grain stocks for the second consecutive year.

#### FARMS OFFERED HARD CURRENCY RUBLES FOR SPECIFIED WHEAT SALES TO STATE

On Aug 8, 1989, the Soviet Council of Ministers adopted a decree (No. 620) authorizing payment of hard currency rubles (reportedly usable for foreign purchase of consumer goods and farm equipment and supplies) to farms for certain high-quality above average sales of wheat, pulses and oilseeds to the state. The experimental program is to be in effect for crop years 1989 and 1990, and an assessment of the measure along with recommendations is to be presented to the Council of Ministers in the first quarter of calendar 1991 by the State Commission for Food and Procurements, and affiliated Ministries.

- To qualify for hard currency payments for wheat sales, production of all grains must exceed the 1981-85 average, sales to the state of all grains must exceed the 1981-85 average, and wheat must meet specified quality criteria.
- To qualify for hard currency payments for pulses, production of peas and lupines must exceed the 1986-88 output average, and sales to the state must exceed the 1986-88 sales average.
- Sales of oilseeds can qualify for hard rubles if production of all oilseeds exceeds the 1986-88 average, and sales of all oilseeds exceed the 1986-88 sales average.

#### USSR: PAYMENT OF HARD CURRENCY RUBLES FOR PROCUREMENT

Commodity/ quality specs.	Convert. rubles per ton	U.S. dollars per ton 1/
WHEAT		
Durum wheat, high grades	60.00	\$99.00
Hard wheat(silnaya), ave. # grade	60.00	\$99.00
Hard wheat(tsennaya), top grade	40.00	\$66.00
PULSES (i.e. peas and lupines)	80.00	\$132.00
OILSEEDS (i.e. sunflowerseed, soybeans, rapeseed, mustard seed, and falseflax seed.)	90.00	\$148.50
1/ Converted at official Soviet exchange rate of Ruble 1.00 = U.S. \$1.65.		

USSR Grain Area, Yield, and Production  
1975-1988, and 1989 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production <u>1/</u> (Million) (Metric Tons)
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Projected)	47.5	1.83	87.0
<u>Coarse Grains 2/</u>			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Projected)	55.5	1.80	100.0
<u>Total Grain 3/</u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Projected)	111.5	1.79	200.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

## USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1989/90

Year	Production	Trade (Jul/Jun)		Availability 1/ July/June	Total 1/ Seed		Industrial	Food	Dockage/ Waste 2/		Feed	Stock Change 3/ July/June
		Imports	Exports		Million Metric Tons)	Seed			Food			
1975/76	140.1	26.1	0.7	166	Total Grains 4/ 178		5	45	14	89	-12	
1976/77	223.8	11.0	3.3	232	25	220	5	45	31	113	+12	
1977/78	195.7	18.9	2.3	212	26	229	5	45	29	124	-16	
1978/79	237.4	15.6	2.8	250	25	230	6	46	28	125	+20	
1979/80	179.2	31.0	0.8	209	26	223	6	46	22	123	-14	
1980/81	189.1	34.8	0.5	223	25	224	6	46	28	119	-1	
1981/82	158.2	47.3	0.5	205	25	211	5	47	16	118	-6	
1982/83	186.8	34.3	0.5	221	25	214	5	47	19	118	+7	
1983/84	192.2	32.5	0.5	224	26	218	5	47	21	120	+6	
1984/85	172.6	55.5	0.5	228	24	219	6	47	19	123	+9	
1985/86	191.7	29.9	0.5	221	24	220	5	47	18	126	+1	
1986/87	210.1	27.5	0.5	237	25	230	5	47	23	130	+7	
1987/88	211.4	32.0	0.5	243	25	239	5	47	30	132	+4	
1988/89 5/	195.1	39.5	0.5	234	25	235	5	48	22	135	-1	
Projected 1989/90	200.0	36.0	1.0	235	25	240	5	48	22	140	-5	
Wheat												
1975/76	66.2	10.1	0.5	76	13	86	1	35	7	30	-10	
1976/77	96.9	4.6	1.0	100	13	92	2	35	14	28	+8	
1977/78	92.2	6.6	1.0	98	14	109	2	35	14	44	-11	
1978/79	120.9	5.1	1.5	124	13	107	2	35	14	43	+18	
1979/80	90.2	12.0	0.5	102	13	114	2	35	11	53	-12	
1980/81	98.2	16.0	0.5	114	13	113	2	35	15	48	+1	
1981/82	81.1	20.3	0.5	101	11	104	2	36	8	47	-3	
1982/83	84.3	20.8	0.5	105	11	101	2	36	9	43	+4	
1983/84	77.5	20.5	0.5	98	11	93	2	36	9	35	+4	
1984/85	68.6	28.1	0.5	96	11	91	2	36	8	35	+5	
1985/86	78.1	15.7	0.5	93	11	92	1	36	8	36	+1	
1986/87	92.3	16.0	0.5	108	11	103	1	36	10	45	+5	
1987/88	83.3	21.5	0.5	104	11	101	1	36	13	40	+3	
1988/89 5/	84.4	15.5	.5	99	11	100	1	37	10	41	-1	
Projected 1989/90	87.0	13.0	1.0	99	11	102	1	37	10	43	-3	
Coarse Grains												
1975/76	65.8	15.6	—	81	11	83	4	7	6	56	-2	
1976/77	115.0	5.7	2.0	119	11	115	3	7	16	78	+4	
1977/78	92.6	11.7	1.0	103	10	108	3	7	14	74	-5	
1978/79	105.4	10.0	1.0	114	10	112	4	7	13	79	+2	
1979/80	81.2	18.4	—	100	12	102	4	7	10	68	-2	
1980/81	80.5	18.0	—	98	12	101	4	7	12	66	-2	
1981/82	69.3	26.0	—	95	13	98	3	7	7	68	-3	
1982/83	91.8	12.5	—	104	13	101	3	7	9	69	+3	
1983/84	101.9	11.5	—	113	13	112	3	7	11	78	+2	
1984/85	90.5	26.9	—	117	12	114	4	7	10	81	+4	
1985/86	100.0	13.7	—	114	12	114	4	7	9	82	—	
1986/87	105.9	11.0	—	117	13	115	4	7	11	80	+2	
1987/88	113.7	10.0	—	124	13	123	4	7	15	84	+1	
1988/89 5/	97.5	23.5	—	121	13	121	4	7	11	86	—	
Projected 1989/90	100.0	22.0	—	122	13	124	4	7	10	90	-2	

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/  
By Country of Origin by months  
In 1,000 Metric Tons

	<u>U.S.</u>	<u>Canada</u>	<u>Australia</u>	<u>EC</u>	<u>Argentina</u>	<u>Sub Total</u>	<u>Total 2/</u>
January 1986	980	171	450	1,160	15	2,776	
February	956	---	494	1,080	---	2,530	
March	71	---	850	852	---	1,773	
Jan-March	2,007	171	1,794	3,092	15	7,079	7,900
April	---	---	373	487	---	860	
May	172	435	575	445	220	1,847	
June	547	646	34	582	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51	---	655	
August	---	501	---	---	---	501	
September	---	666	14	1	---	681	
July-September	---	1,771	14	52	---	1,837	2,600
October	---	1,027	211	314	---	1,552	
November	---	1,264	300	640	---	2,204	
December	---	1,198	129	740	---	2,067	
October-December	---	3,489	640	1,694	---	5,823	6,900
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452	765	5,117	
May	1,840	777	123	1,050	412	4,202	
June	193	11	13	150	40	407	
April-June	3,786	1,806	265	2,652	1,217	9,726	12,400
July	1,915	---	---	59	10	1,984	
August	1,064	---	---	---	---	1,089	
September	316	74	---	---	---	415	
July-September	3,295	74	---	59	10	3,488	4,600
October	---	872	---	540	---	1,422	
November	525	357	---	708	---	1,607	
December	1,703	332	---	435	---	2,485	
October-December	2,228	1,561	---	1,683	---	5,514	6,500
January 1988	1,852	72	---	647	---	2,571	
February	1,746	93	---	764	135	2,738	
March	2,255	101	---	924	486	3,766	
Jan-March	5,853	366	---	2,335	621	9,075	10,000
April	2,406	713	---	275	332	3,726	
May	1,995	1,123	---	180	6	3,304	
June	755	898	---	235	---	1,888	
April-June	5,156	2,734	---	690	338	8,918	10,400
July	375	131	---	53	35	594	
August	804	---	---	15	175	994	
September	344	126	---	1	4	475	
July-September	1,523	257	---	69	214	2,063	2,600
October	1,935	524	---	480	264	3,203	
November	1,529	341	15	1,011	114	3,010	
December	1,585	261	---	1,422	47	3,315	
October-December	5,049	1,126	15	2,913	425	9,528	10,800
January 1989	2,234	316	---	633	43	3,226	
February	2,631	172	---	861	23	3,687	
March	3,115	81	---	954	202	4,352	
Jan-March	7,980	569	---	2,448	268	11,265	12,100
April	2,105	371	80	1,500 3/	182	4,238	
May	3,061	351	104	650 3/	221	4,387	
June	2,752	60	66	450 3/	66	3,394	
April-June	7,918	782	250	2,600 3/	469	12,019	13,500

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

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*Resume*

# USSR Grain Situation and Outlook

OCT 1 1989

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The projected 1989 Soviet grain crop was reduced by 10 million tons to 200 million because of lower area and decreased yields. The area reductions reflect the significantly lower than expected preliminary sown area recently released by the USSR. While there were excellent harvest reports from many areas in the European USSR, they only partially offset the impacts on output from the lower area and hot, dry conditions in the major spring grain areas. Major production estimates changed as follows: wheat was down by 4.5 million tons to 87.0 million; coarse grains were down by 5.5 million to 100 million.

## WEATHER AND CROP DEVELOPMENTS

In the European USSR, above-normal precipitation in July over Belorussia, the Central Region, Black Soils Region, Volga, and the North Caucasus benefited spring barley and summer crops. Rainfall during June and July for the Ukraine, western Black Soils Region, and the North Caucasus has been about half of that which fell during the same period last year, creating more favorable harvest conditions. While July's dryness in the Ukraine limited moisture for corn in the reproductive to filling stages of development, below-normal temperatures reduced crop-moisture demands. Since August 1, wet weather in Belorussia, the Black Soils Region, and the Ukraine have delayed harvest.

In spring grain areas east of the Volga, hot, dry weather intensified during July. Well below normal precipitation covered more than half of the spring wheat producing areas and about one third of the spring barley producing areas. In addition, high temperatures ranging from 33 to 39 degrees Celsius on several days in July were accompanied by low humidities (vapor pressure deficits above 30 millibars), and occasional windy weather. These unfavorable weather conditions produced moderate to severe stress on spring grains which were advancing through the reproductive and early filling stages of development. Comparing total precipitation for June and July, rainfall was less than half of that which fell last year in the eastern Urals, most of Kazakhstan, and the western half of West Siberia. Precipitation was higher than last year in extreme western and eastern crop areas. Since August 1, much cooler weather along with light showers in the Urals and Kazakhstan has come too late to help maturing spring grains.

## 1989 HARVEST PROGRESS AHEAD OF LAST YEAR

As of July 24, 1989, Soviet grains and pulses (excluding corn) had been cut on 28.7 million hectares and threshed on 24.5 million. The pace of the 1989 grain harvest, to date, is well ahead of the last 2 years, and roughly equivalent to 1986. Grain harvesting is ending in the North Caucasus, the southern Ukraine and Moldavia, according to Sel' skaya Zhizn', August 1, 1989. More than a quarter of the area has been threshed in the Russian Republic, and about 20 percent of the area in Belorussia. Grain harvesting has begun in Kazakhstan and the Baltics.

## IMPORT ESTIMATE INCREASED

The estimate of USSR grain imports for July/June 1989/90 has been increased by 3 million tons to 36 million tons, as a result of the significant downward adjustment in the 1989 grain crop estimate. Wheat imports are projected at 13 million tons while coarse grain imports have been revised upwards to 22 million tons. Miscellaneous grains, rice and pulses account for the balance. USSR grain buyers appeared to be relatively inactive over the past month as total purchases from all origins for delivery in 1989/90 still total less than 5 million tons. The United States is about the only major supplier with reported sales for 1989/90 delivery. Earlier reports indicated that Canada may have sold some wheat to the USSR; however, there has yet to be any official confirmation of these reports. EC grain suppliers expect the USSR to enter their market for both wheat and barley over the next month. Australia and Argentina, the major southern hemisphere suppliers will likely have to wait for new crop availability before making significant sales to the USSR. Soviet grain purchases from the smaller exporters are likely to shrink in 1989/90 as exportable wheat supplies are down in these countries.

Adverse weather over the spring wheat producing areas of the USSR is likely to reduce the quantity of the 1989 wheat crop. However, wheat quantity and quality in the European USSR appears to be better this year with procurements of quality wheat running ahead of a year ago. Still wheat imports are expected to total 13 million tons in 1989/90 up 1 million tons from the month earlier estimate. The bulk of these imports likely will be covered by the various grain trading agreements or arrangements that the USSR has with supplying countries. Coarse grain imports are currently projected at 22 million tons, up 2 million from a month ago. The combination of lower world coarse grain prices, high feed wheat prices and efforts to improve the availability of livestock products should result in another year of heavy USSR coarse grain imports.

Reflecting recently received reports from the major countries shipping grain to the USSR, there have been some revisions in the 1988/89 import estimates. Wheat imports in 1988/89 have been increased by 500,000 tons to 15.5 million tons. Estimated coarse grains imports for 1988/89 have been reduced by 500,000 tons to 23.5 million as late season shipments fell short of expectations.

## DOMESTIC USE ESTIMATE LOWERED

The estimate of grain utilization in the USSR for 1989/90 is basically unchanged. There is a modest reduction from a month ago in the allowance for dockage and waste as a result of the smaller 1989 harvest estimate. Grain for feed use is still expected to climb to 140 million tons with other utilization categories, food, seed, and industrial use adding another 78 million. With utilization now expected to exceed the 1989 crop outturn, the USSR is expected to draw down grain stocks modestly in 1989/90.

## U.S. - USSR TO MEET ON NEW LTA

The United States and the Soviet Union will begin negotiations on a new long term grain purchase agreement late in 1989. Preliminary talks are scheduled to take place in Moscow during the week of December 4.

## 1989 SOVIET GRAIN AREA REPORTEDLY AT RECORD LOW

According to the Soviet Mid-year Plan Fulfillment Report, preliminary 1989 grain area is 112.9 million hectares. Based on this, USDA estimates final area at 111.5 million hectares, the lowest grain area since 1955. The sharp fall in grain area is largely reflected in the decline in total area sown to crops, possibly due, partly to less investment in land reclamation projects. Possible increases in both forage and oilseed areas as well as expanded fallow area might also account for the decline in grain area.

### USSR: Crop and Fallow Area

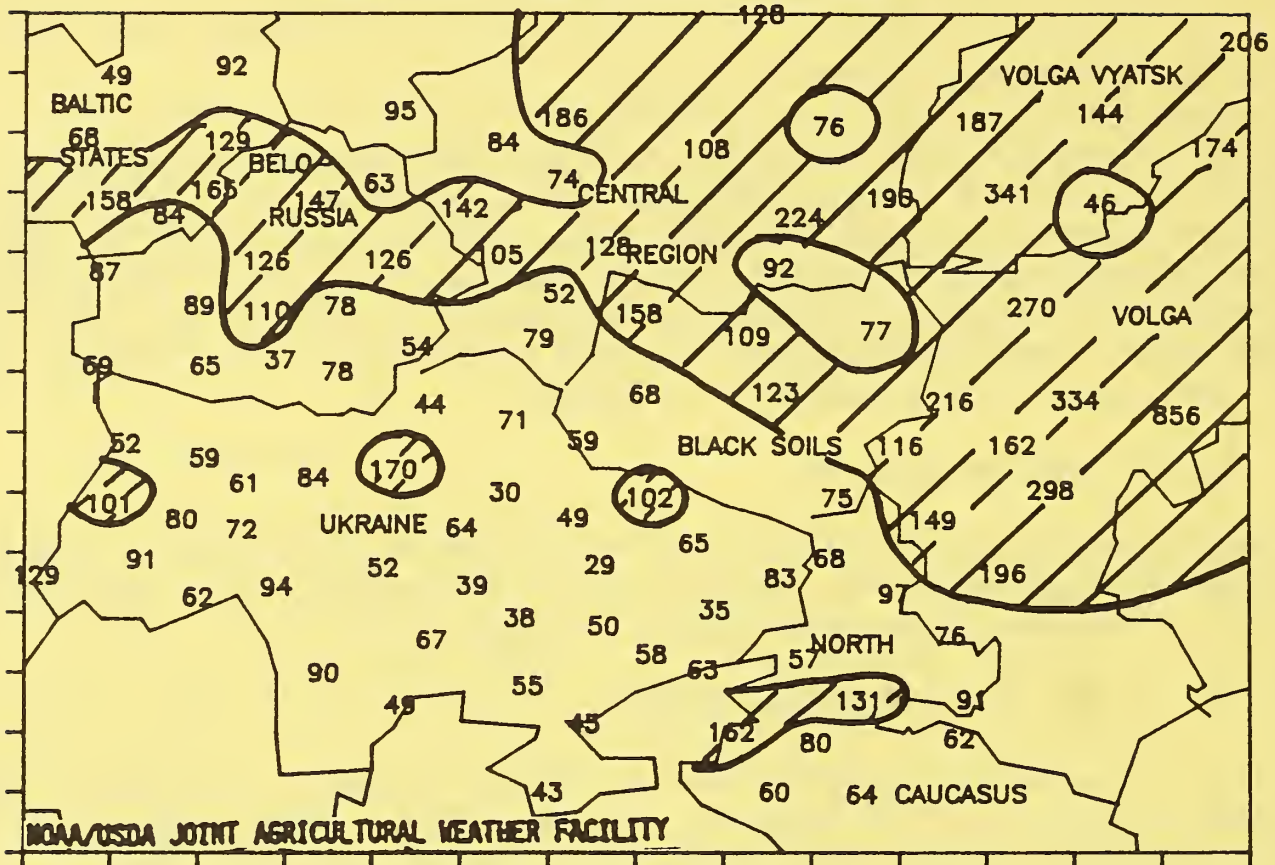
Total Sown Area		Total Grain Area		Forage	Fallow
		Million Hectares			
1980	217.9	130.0	126.6	66.9	13.8
1981	214.9	126.4	125.6	66.1	16.4
1982	214.3	123.9	123.0	67.9	17.4
1983	213.0	122.5	120.8	68.7	19.5
1984	212.6	NA	119.6	69.9	20.1
1985	210.3	119.3	117.9	69.8	21.3
1986	210.3	118.1	116.5	71.4	21.7
1987	211.5	117.6	115.2	73.3	20.9
1988	211.6	116.1	114.9	73.6	20.4
1989 1/	209.3	112.9	NA	NA	NA

1/ Preliminary

Sources: Vestnik Statistiki, various years;  
Narodnaye Khozyaistro SSSR, various years.

# WESTERN USSR: JUNE 1 — JULY 31

PRECIPITATION: 1989 AS PERCENT OF 1988



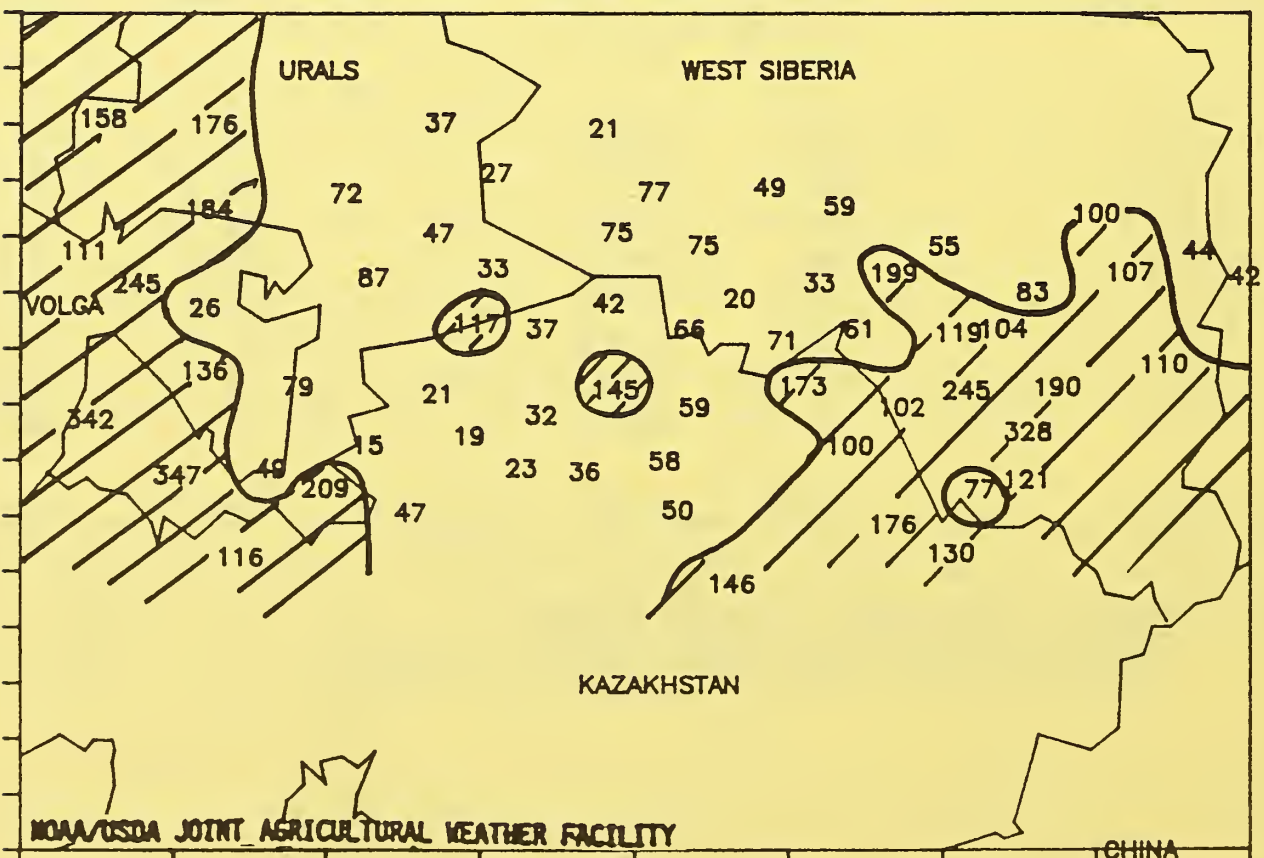
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# NEW LANDS: JUNE 1 — JULY 31

PRECIPITATION: 1989 AS PERCENT OF 1988



ABOVE 1988



BELOW 1988

USSR Grain Area, Yield, and Production  
1975-1988, and 1989 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production <sup>1/</sup> (Million) (Metric Tons)
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Projected)	47.5	1.83	87.0
<u>Coarse Grains <sup>2/</sup></u>			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Projected)	55.5	1.80	100.0
<u>Total Grain <sup>3/</sup></u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Projected)	111.5	1.79	200.0

<sup>1/</sup> "Bunker weight" basis; not discounted for excess moisture or foreign material.

<sup>2/</sup> Includes rye, barley, oats, corn, sorghum, and millet.

<sup>3/</sup> Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

Year	Production	Trade (Jul/Jun) Imports Exports	Availability 1/ July/June	Total 1/ Seed	Industrial	Food	Dockage/ waste 2/ Feed	Stock Change 3/ July/June
				(Million Metric Tons)				
				Total Grains 4/				
1975/76	140.1	26.1	0.7	178	5	45	14	-12
1976/77	223.8	11.0	3.3	220	5	45	31	+12
1977/78	195.7	18.9	2.3	229	5	45	29	-16
1978/79	237.4	15.6	2.8	230	6	46	28	+20
1979/80	179.2	31.0	0.8	223	6	46	22	-14
1980/81	189.1	34.8	0.5	223	6	46	28	-1
1981/82	158.2	47.3	0.5	211	5	47	16	-6
1982/83	186.8	34.3	0.5	214	5	47	19	+7
1983/84	192.2	32.5	0.5	218	5	47	21	+6
1984/85	172.6	55.5	0.5	219	6	47	19	+9
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1986/87	210.1	27.5	0.5	230	5	47	23	+7
1987/88	211.4	32.0	0.5	239	5	47	30	+4
1988/89 5/	195.1	39.5	0.5	235	5	48	22	-1
Projected 1989/90	200.0	36.0	1.0	240	5	48	22	-5
				Wheat				
1975/76	66.2	10.1	0.5	86	1	35	7	-10
1976/77	96.9	4.6	1.0	92	2	35	14	+8
1977/78	92.2	6.6	1.0	109	2	35	14	-11
1978/79	120.9	5.1	1.5	107	2	35	14	+18
1979/80	90.2	12.0	0.5	114	2	35	11	-12
1980/81	98.2	16.0	0.5	113	2	35	15	+1
1981/82	81.1	20.3	0.5	104	2	36	8	-3
1982/83	84.3	20.8	0.5	101	2	36	9	+4
1983/84	77.5	20.5	0.5	93	2	36	9	+4
1984/85	68.6	28.1	0.5	91	2	36	8	+5
1985/86	78.1	15.7	0.5	92	1	36	8	+1
1986/87	92.3	16.0	0.5	103	1	36	10	+5
1987/88	83.3	21.5	0.5	101	1	36	13	+3
1988/89 5/	84.4	15.5	.5	100	1	37	10	-1
Projected 1989/90	87.0	13.0	1.0	102	1	37	10	-3
				Coarse Grains				
1975/76	65.8	15.6	—	83	4	7	6	-2
1976/77	115.0	5.7	2.0	115	3	7	16	+4
1977/78	92.6	11.7	1.0	108	3	7	14	-5
1978/79	105.4	10.0	1.0	112	4	7	13	+2
1979/80	81.2	18.4	—	102	4	7	10	-2
1980/81	80.5	18.0	—	101	4	7	12	-2
1981/82	69.3	26.0	—	98	3	7	7	-3
1982/83	91.8	12.5	—	101	3	7	9	+3
1983/84	101.9	11.5	—	112	3	7	11	+2
1984/85	90.5	26.9	—	114	4	7	10	+4
1985/86	100.0	13.7	—	114	4	7	9	—
1986/87	105.9	11.0	—	115	4	7	11	+2
1987/88	113.7	10.0	—	123	4	7	15	+1
1988/89 5/	97.5	23.5	—	121	4	7	11	—
Projected 1989/90	100.0	22.0	—	124	4	7	10	-2

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

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*Resume*

# USSR Grain Situation and Outlook

The 1989 Soviet grain crop continues to be estimated at 210 million metric tons from a total area of 115 million hectares. The production estimate includes 91.5 million tons of wheat, 105.5 million tons of coarse grains, and 13 million tons of miscellaneous grains and pulses. Winter grain yields continue to be estimated at above the 1986-88 average, although below last year's. Spring grain yields are forecast above 1988's drought-reduced yields, but below 1986 and 1987 levels. Although harvesting has begun in parts of the USSR, no reports on national harvest progress have been issued.

## WEATHER AND CROP DEVELOPMENTS

In early June, unfavorably hot, dry weather developed over the eastern Ukraine, the North Caucasus, the Black Soils Region, and the lower Volga, stressing winter grains in the reproductive to filling stages. By mid-June, cooler weather, accompanied by widespread showers and thunderstorms, alleviated crop stress. Over most of the European USSR, this showery weather pattern continued throughout the month, producing above-normal precipitation. The rain which covered the southern Ukraine reversed the dry conditions which had persisted for several months. Twice the normal amount of rainfall covered Belorussia, the southern portion of the Central Region, the western Ukraine, and the Black Soils Region. Although June's precipitation was mostly beneficial, locally heavy downpours along with gusty winds in the western Ukraine and the southern half of the North Caucasus may have caused some lodging. During June, winter grains in the European USSR advanced through reproduction in the north and were mostly filling in the south. Spring barley advanced through reproduction. Since July 1, wet weather has covered northern crop areas, benefiting filling spring grains. However, dry weather in the Ukraine helped winter grain harvesting.

In most crop areas east of the Volga, below-normal precipitation in June covered spring grains in the vegetative stage. While minor spring wheat producing areas received above-normal precipitation, the central crop areas received generally less than 50 percent of normal rainfall. June's dryness in the Urals, central Kazakhstan, and the western portion of West Siberia was accompanied by much above-normal temperatures which accelerated crop development and reduced soil moisture reserves. From July 4-9, hot, dry weather intensified in these areas and spread eastward, increasing stress on spring grains in or nearing reproduction. Recently, cooler weather and light showers lowered crop stress.

#### BUYING ACTIVITY SLOW; 1989/90 IMPORT ESTIMATED UNCHANGED

USSR grain buying activity continued relatively subdued over the past month. The USSR added to purchases of U.S. corn and wheat, including over 600,000 tons of wheat outside of the Export Enhancement Program. Recent wheat shipments support earlier reports that the Canadians might sell additional wheat to the USSR for late-season 1988/89 and early-season 1989/90 delivery. In addition, reports indicate that the USSR and Canada have already agreed on the level of grain trade for the first half of their 1989/90 grain trade agreement year. As the USSR still has to purchase about 10 million tons of Canadian wheat and barley during the next two years in order to cover the minimum of 25 million tons, it is likely that trade over the next full year could approach 5 million tons. The current Australian and Argentine grain shipping programs to the USSR appear to be completed, with any new sales depending on 1989 crop supplies.

The estimate of USSR grain imports for July-June 1989/90 continues at 33 million tons, including 20 million of coarse grain, and 12 million of wheat, with the balance rice, pulses, and miscellaneous grains. USSR coarse grain imports are expected to continue high despite prospects for a larger 1989 crop. The combination of domestic efforts to increase meat production and lower levels of world corn prices is expected to result in a record amount of coarse grains being used for livestock feed in the USSR in 1989/90.

Estimated wheat imports of 12 million tons would be the lowest in a decade. The combination of an improved domestic crop, strong world wheat prices, and limited exportable feed wheat supplies is expected to hold down USSR wheat imports. The bulk of the USSR's 1989/90 wheat import requirements are likely to be met by Canada, the United States, and France, all of which have some sort of trade agreement or arrangement with the USSR.

#### IMPORT ESTIMATE UNCHANGED FOR 1988/89

The estimate of grain imports for 1988/89 of 39.5 million tons is unchanged from a month ago. Recent purchases indicate that the USSR could slightly exceed the wheat import projection of 15 million tons. However, any adjustment in the current import estimate will depend on further reports of shipment data from the major exporters. The absence of late-season Argentine corn and sorghum sales and some lag in U.S. corn shipments could mean that USSR coarse grain imports may fall fractionally below the current estimate of 24 million tons.

#### DOMESTIC USE ESTIMATE UNCHANGED

The estimate of grain utilization in the USSR for 1989/90 is a record 242 million tons. Grain for feed use is expected to climb to 140 million tons with other utilization categories, food, seed, and industrial use accounting for another 78 million. The allowance for dockage and waste has been placed at 24 million tons or 11 percent of the projected 1989 crop.

USSR Grain Area, Yield, and Production  
1975-1988, and 1989 (Projected)

Grain	Area ( <u>Million Hectares</u> )	Yield (Metric Tons) ( <u>Per Hectare</u> )	Production <sup>1/</sup> ( <u>Million</u> ) (Metric Tons)
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Projected)	49.0	1.87	91.5
<u>Coarse Grains <sup>2/</sup></u>			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Projected)	57.0	1.85	105.5
<u>Total Grain <sup>3/</sup></u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Projected)	115.0	1.83	210.0

<sup>1/</sup> "Bunker weight" basis; not discounted for excess moisture or foreign material.

<sup>2/</sup> Includes rye, barley, oats, corn, sorghum, and millet.

## USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1989/90

Year	Production	Trade (Jul/Jun)		Availability 1/	Total 1/	Seed	Industrial	Food	Dockage/	Feed	Stock Change 3/
		Imports	Exports	July/June					Waste 2/		July/June
(Million Metric Tons)											
Total Grains 4/											
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88	211.4	32.0	0.5	243	239	25	5	47	30	132	+4
1988/89 5/	195.1	39.5	0.5	234	235	25	5	48	22	135	-1
Projected 1989/90	210.0	33.0	1.0	242	242	25	5	48	24	140	—
Wheat											
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88	83.3	21.5	0.5	104	101	11	1	36	13	40	+3
1988/89 5/	84.4	15.0	.5	99	100	11	1	37	10	41	-1
Projected 1989/90	91.5	12.0	1.0	102	102	11	1	37	10	44	—
Coarse Grains											
1975/76	65.8	15.6	—	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	—	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	—	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	—	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	—	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	—	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	—	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	—	114	114	12	4	7	9	82	—
1986/87	105.9	11.0	—	117	115	13	4	7	11	80	+2
1987/88	113.7	10.0	—	124	123	13	4	7	15	84	+1
1988/89 5/	97.5	24.0	—	121	121	13	4	7	11	86	—
Projected 1989/90	105.0	20.0	—	126	126	13	4	7	12	90	—

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

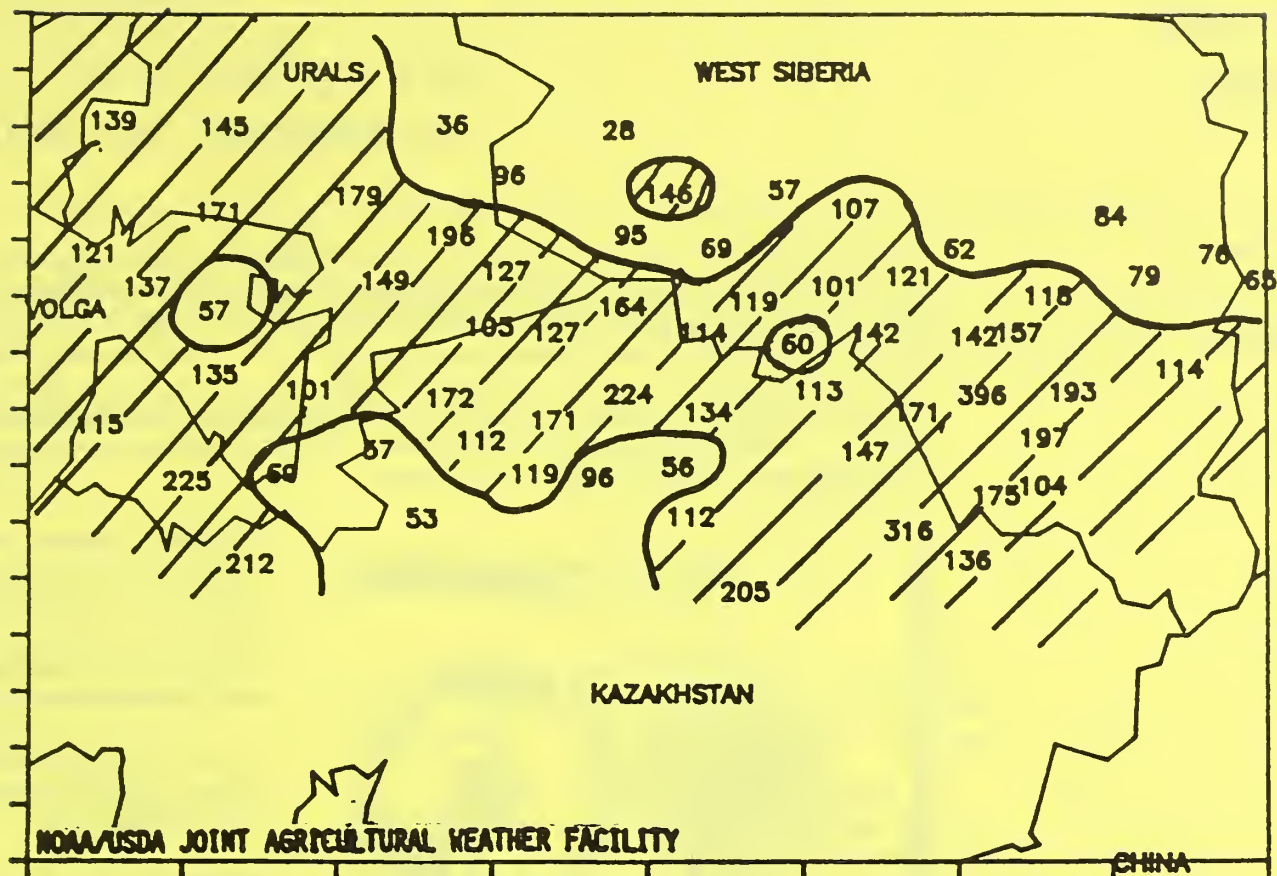
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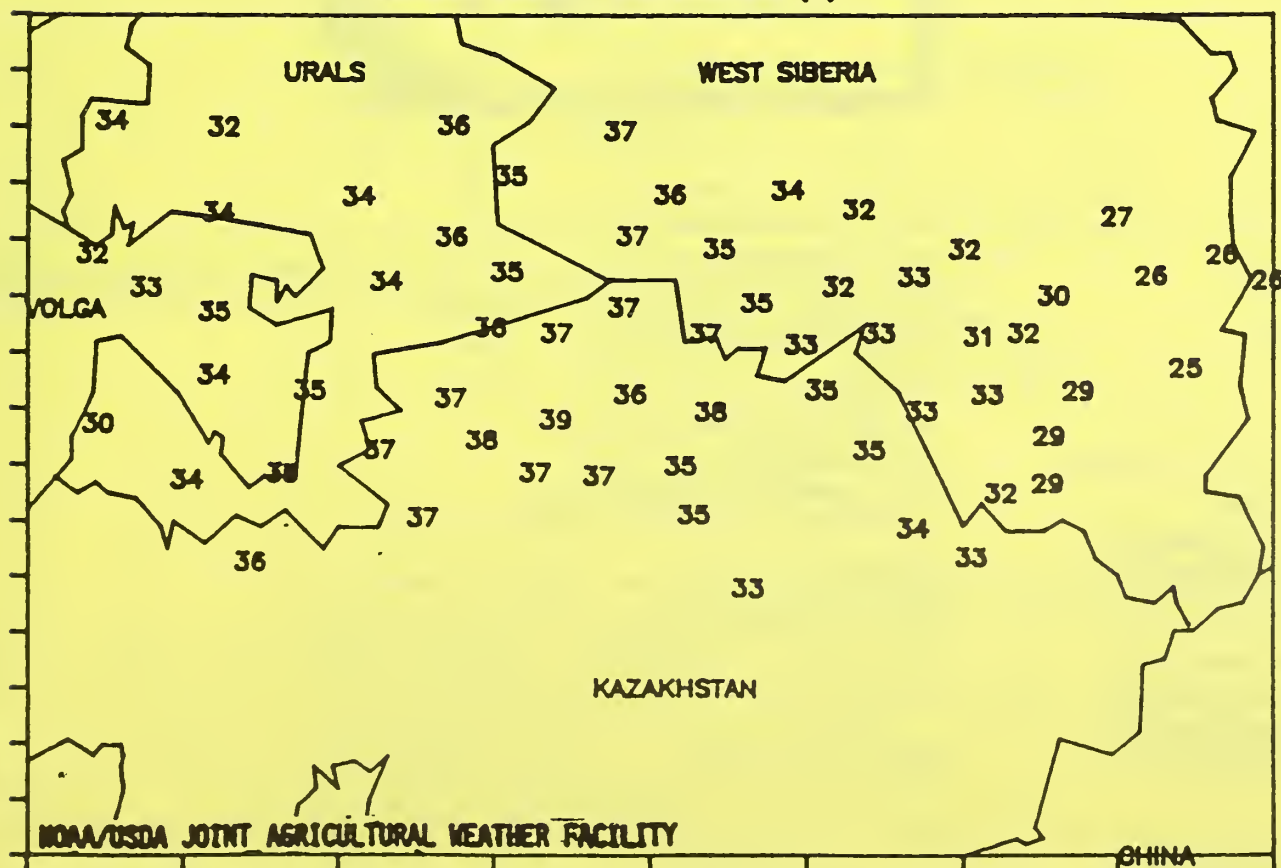
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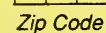


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Circular Series

SG 3-89

June 1989

# USSR Grain Situation and Outlook

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## USSR GRAIN CROP PROSPECTS 1989

The estimate of the 1989 Soviet grain crop remains unchanged at 210 million metric tons including 91.5 million tons of wheat, 105.5 million tons of coarse grains and 13.0 million tons of miscellaneous grains and pulses. The total grain area also remains unchanged at 115 million hectares. Sowing of spring grains appears to have been completed in most areas with possibly slight delays having occurred in the northern portions of the New Lands due to widespread precipitation.

### WEATHER AND CROP DEVELOPMENTS

In the European USSR, widespread showers and thunderstorms in May produced above-normal precipitation over the western Ukraine, the North Caucasus, and the Volga Valley. Although the rain was mostly beneficial for winter grains entering reproduction, local flooding occurred in the extreme western Ukraine and the eastern portion of the North Caucasus. Winter grains entered the reproductive phase of development over most of the Ukraine and the North Caucasus by month's end. Crop progress for spring grains ranged from emergence to tillering in the north, to jointing in the south. Although May's precipitation was below normal in the Baltic States, Belorussia, the northern Ukraine, and the Black Soils Region, adequate soil moisture reserves met increasing crop-moisture demands. Soil moisture reserves were limited in the southern Ukraine where precipitation has been below normal since January. Monthly average temperatures were below normal over eastern crop areas with a brief episode of frost covering crops in the eastern Black Soils Region, the eastern Ukraine, and the northern North Caucasus on May 24.

Since early June, wet weather reversed a drying trend in the Baltic States and Belorussia. Hot, dry weather developed in the eastern Ukraine, the North Caucasus, the Black Soils Region, and the lower Volga on June 7 and continued through June 11, stressing winter grains in the reproductive to filling stages. On June 12, cooler weather and showers helped relieve stress conditions.

In crop areas east of the Ural mountains, above-normal May precipitation covered most crop areas, providing ample topsoil moisture for spring grain establishment. Above-normal temperatures during mid-month were replaced by unusually cold weather, which slowed germination. In early June, light showers covered most crop areas. Recently, unseasonably warm, dry weather developed in the southern Urals.

## IMPORT ESTIMATE FOR 1989/90 UNCHANGED

USSR grain imports for July-June 1989/90 are projected at 33 million tons, unchanged from a month ago and more than 15 percent below last year's heavy pace. Coarse grains are expected to dominate the USSR grain import program, again. Although prospects for a much improved 1989 harvest are expected to lead to smaller USSR coarse grain imports, they are still expected to account for over 60 percent of total grain imports, about the same as forecast for 1988/89. This is in sharp contrast to other recent years when wheat made up the majority of grain imports. The combination of USSR efforts to increase the availability of livestock products and expected lower world corn prices is projected to result in record large grain for feed utilization and continued heavy corn imports in 1989/90.

In sharp contrast to the situation for coarse grains, projected USSR wheat imports, at 12 million tons, are the smallest since 1979/80. Strong world wheat prices are expected to limit USSR imports of feed quality wheat in 1989/90 while improved domestic crop prospects should reduce imports of milling quality wheat.

## GRAIN IMPORTS FOR 1988/89 CLIMB

A recent flurry of USSR coarse grain purchases, particularly from the United States, has resulted in an increase in the estimate of 1988/89 coarse grain imports to 24 million tons, the third largest on record. Total grain imports are now expected to climb to 39.5 million tons. U.S. coarse grains sales to the USSR for delivery in the 1988/89 marketing year are expected to total nearly 18 million tons, the highest ever for this July-June period. Grain sorghum sales of around a million tons have helped push the total to a new high.

## DOMESTIC USE TO REACH NEW RECORD

Domestic grain utilization for 1989/90 is projected at a record 242 million tons. Grain for feed use is expected to climb to 140 million tons as the USSR moves to increase the availability of livestock products. Actual utilization of grain, including seed, industrial use, food, and feed is projected at a record 218 million tons. The allowance for dockage and waste has been placed at 24 million tons or 11 percent of the projected crop. Total utilization is expected to equal the 1989 crop plus net imports; consequently the USSR is not expected to add to grain stocks in 1989/90.

## SOVIET FARMS SELLING LESS GRAIN TO STATE

State procurements of grain in 1988 fell to 61.4 million tons, down 16 percent from 1987 and the lowest since 1984. The growing volume of grain retained at the farm level, and the smaller 1988 grain output account for the marked drop in State procurements. The 31-percent share of grain production that the State procured in 1988 is the lowest since the 30-percent share in 1965. The 1988 share is in stark contrast with the 38-percent average share during 1976-80, and the 37-percent average during 1981-85.

Although wheat production rose in 1988, State wheat procurements fell by about 2 percent to the lowest since 1984. The share of wheat output procured by the State in 1988 was only 41 percent, compared to the average share of 48 percent and 43 percent in 1976-80 and 1981-85, respectively. However, State procurements of "quality wheat" were reportedly up from 1987.

USSR: Grain production and procurements

ALL GRAIN				WHEAT		
	PRODUCTION	PROCUREMENT	P/P	PRODUCTION	PROCUREMENT	P/P
	MILLION TONS		%	MILLION TONS		%
1976-80 average	205.0	77.7	38	99.7	47.9	48
1980	189.1	69.3	37	98.2	46.5	47
1981	158.2	58.1	37	81.1	37.0	46
1982	186.8	69.7	37	84.3	36.7	44
1983	192.2	75.6	39	77.5	34.1	44
1984	172.6	56.3	33	68.6	25.5	37
1985	191.7	73.5	38	78.1	35.1	45
1986	210.1	78.8	38	92.3	43.8	47
1987	211.4	73.3	35	83.3	35.2	42
1988	195.1	61.4	31	84.4	34.5 1/	41 1/
1989 2/	241.0	85.7	36	NA	NA	NA

1/ ERS estimates based on Soviet data.

2/ Plan figures from: APK, No. 1, 1989.

Sources: Narodnoye khozyaistvo, various years; Sel'skoye

khozyaistvo SSSR, 1988.

## USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1989/90

Year	Production	Trade (Jul/Jun)		Availability 1/ July/June	Total 1/ Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June	
		Imports	Exports								
(Million Metric Tons)											
Total Grains 4/											
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7
1987/88	211.4	32.0	0.5	243	239	25	5	47	30	132	+4
1988/89 5/	195.1	39.5	0.5	234	235	25	5	48	22	135	-1
Projected 1989/90	210.0	33.0	1.0	242	242	25	5	48	24	140	—
Wheat											
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5
1987/88	83.3	21.5	0.5	104	101	11	1	36	13	40	+3
1988/89 5/	84.4	15.0	.5	99	100	11	1	37	10	41	-1
Projected 1989/90	91.5	12.0	1.0	102	102	11	1	37	10	44	—
Coarse Grains											
1975/76	65.8	15.6	—	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	—	100	102	12	4	7	10	68	-2
1980/81	80.5	18.0	—	98	101	12	4	7	12	66	-2
1981/82	69.3	26.0	—	95	98	13	3	7	7	68	-3
1982/83	91.8	12.5	—	104	101	13	3	7	9	69	+3
1983/84	101.9	11.5	—	113	112	13	3	7	11	78	+2
1984/85	90.5	26.9	—	117	114	12	4	7	10	81	+4
1985/86	100.0	13.7	—	114	114	12	4	7	9	82	—
1986/87	105.9	11.0	—	117	115	13	4	7	11	80	+2
1987/88	113.7	10.0	—	124	123	13	4	7	15	84	+1
1988/89 5/	97.5	24.0	—	121	121	13	4	7	11	86	—
Projected 1989/90	105.0	20.0	—	126	126	13	4	7	12	90	—

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Grain Area, Yield, and Production  
1975-1988, and 1989 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production <u>1/</u> (Million) (Metric Tons)
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Projected)	49.0	1.87	91.5
<u>Coarse Grains 2/</u>			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Projected)	57.0	1.85	105.5
<u>Total Grain 3/</u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Projected)	115.0	1.83	210.0

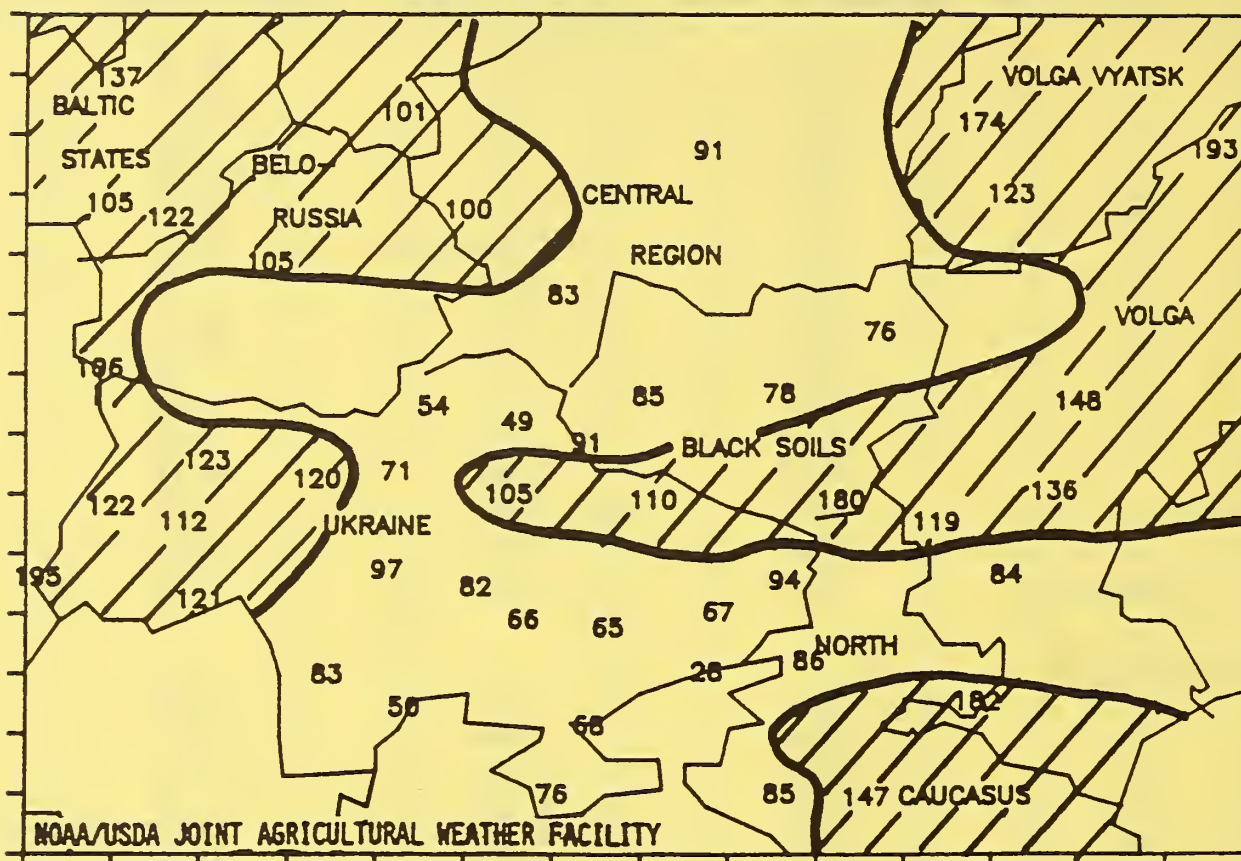
1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

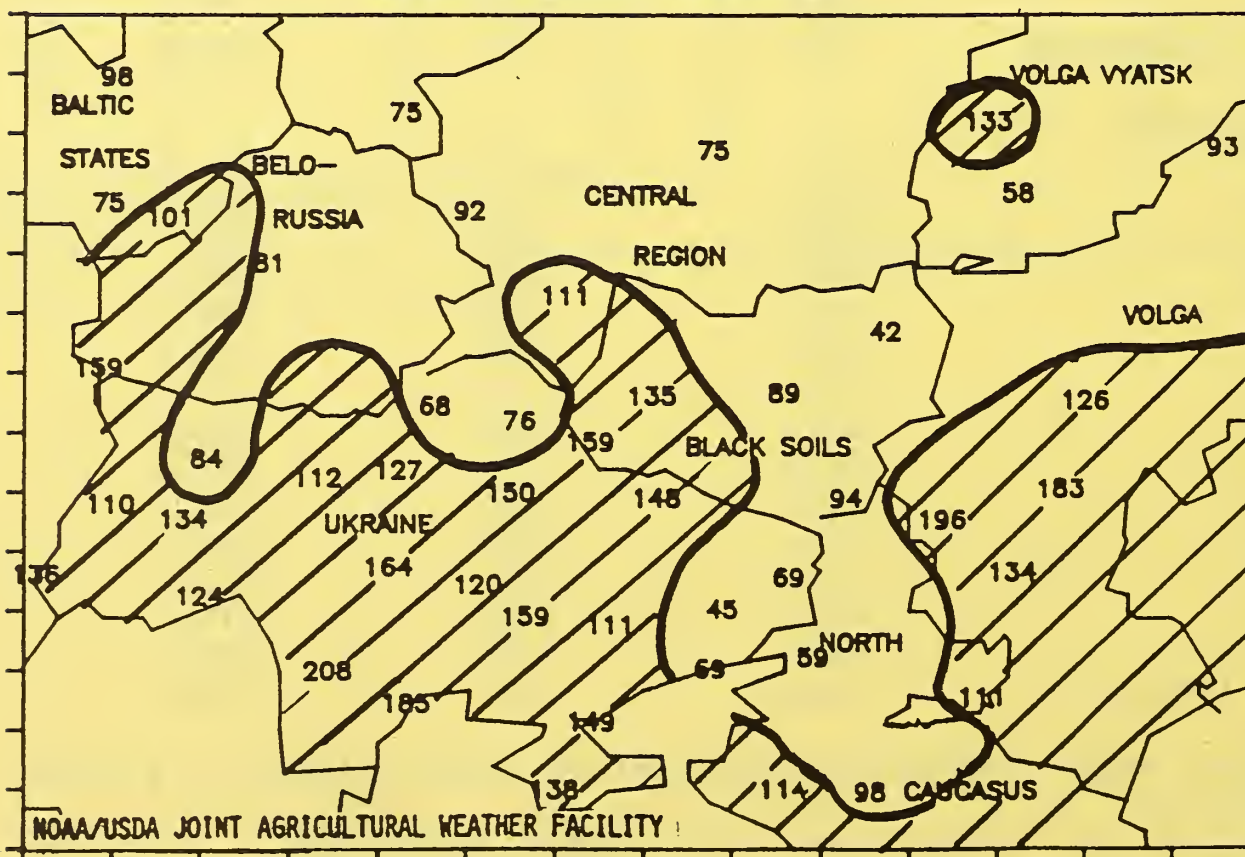
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# USSR Grain Situation and Outlook

Circular Series

SG 2-89

May 1989

The first review of the 1989/90 USSR grain situation is characterize by:

...Prospects for a good 1989 grain harvest as a result of a relatively good growing season to date.

...Expectations that grain utilization will climb to an all-time high as efforts to increase the availability of livestock products pushes grain for feed utilization to a new record.

...Continued large grain imports, particularly coarse grains, as the USSR acts to cover shortfalls in supplies of feed ingredients.

## 1989 CROP PROSPECTS

The first USDA forecast of the 1989 Soviet grain crop is 210 million tons, up 15 million tons from the 1988 crop. This includes 91.5 million tons of wheat, 105.5 million tons of coarse grains and 13 million tons of miscellaneous grains and pulses. Total estimated grain area at 115 million hectares is virtually unchanged from last year. The winter grain yields are forecast slightly less than last year, while spring grain yields are up. These projections are highly tentative, and are subject to change as the season progresses.

Sowing of spring grains got off to a quick start this year as a result of the early spring and generally dry weather. As of April 3, spring grains (excluding corn) had been sown on 7.5 million hectares, nearly 2 weeks ahead of the average pace. Sowing of all spring crops, at 10.8 million hectares, was nearly triple the area for this date in 1988. No additional sowing data has been received, in contrast to the bi-weekly reports received last year.

## WEATHER AND CROP DEVELOPMENTS

Timely planting along with adequate moisture last fall favored emergence and establishment of the 1989 winter grain crop. Overwintering conditions were generally favorable, with above-normal temperatures minimizing the potential for above-average winterkill. However, some problems did develop, as indicated in articles in the Soviet press which expressed concern about the potential adverse effects of a prolonged ice crust which stretched from northern Belorussia through the northeastern Ukraine, as well as a deep snow cover over lightly frozen soils in northeastern winter rye areas.

Approved by the World Agricultural Outlook Board - USDA

Moisture accumulations during the winter were near to above-normal over most winter grain areas, except for Moldavia and the southwestern Ukraine, where precipitation was well below normal.

In April, above-normal precipitation covered the northern two-thirds of European USSR, benefiting winter grains and providing favorable topsoil moisture for spring planting. Crop areas in the southern Ukraine and the central North Caucasus received well-below-normal rainfall, continuing a drying trend which began in mid-January. The weather continued unusually mild, accelerating winter grains growth and development. By month's end, winter grains had advanced to the jointing stage as far north as the southern portion of the Central Region, about 3 weeks earlier than usual.

Since early May, widespread timely rains in the southern Ukraine and the central North Caucasus benefited winter grains which were entering the heading stage, as well as spring grains in the early vegetative stage. Widespread, light precipitation covered northern crop areas where adequate moisture reserves continued to favor crop growth.

In spring grain areas east of the Urals, spring crop planting usually begins around mid-May. Since February, near-to above-normal precipitation in most areas provided favorable topsoil moisture for planting. However, subsoil moisture reserves likely remain limited, especially in eastern areas.

#### GRAIN SUPPLIES EXPECTED TO CONTINUE LARGE AND DOMESTIC USE HEAVY

The combination of a good crop and continued heavy imports will result in USSR grain supplies for 1989/90 of over 240 million tons, second only to the record 1978/79 supplies. However, this year's large supplies (excluding stocks) are expected to just cover projected demand. Coarse grain supplies are projected to be record large.

USSR domestic use of grain is expected to reach a record 242 million tons. Actual utilization of grain including seed, industrial use, food and feed is projected at a record 218 million tons. The allowance for dockage and waste has been placed at 24 million tons or 11 percent of the projected crop. With total grain utilization forecast to equal the 1989 crop plus imports, grain stocks should hold at the year-earlier level.

#### IMPORTS CONTINUE LARGE

USSR grain imports in 1989/90 are projected at 33 million tons, on par with the average of the past decade. Coarse grain imports are forecast to continue heavy despite expectations for a significantly larger 1989 coarse grain crop. The push to increase livestock product output has increased the demand for imported corn and grains for feed. In addition, another year of strong wheat prices is likely to discourage USSR imports of feed wheat. Total wheat imports are

projected to decline to 12 million tons, the lowest level since 1979/80. The combination of an improved USSR wheat crop, and high world prices for both milling and feed wheat is likely to limit USSR wheat imports to not much more than the levels required under their various long term grain agreements.

#### UNITED STATES INCREASES LTA CONSULTATION TRIGGER LEVEL

At the recent U.S.-USSR semi-annual grain consultations, the United States increased the consultation level on USSR purchases of U.S. grain to 24 million tons for this agreement year (October-September). This follows earlier increases in the level to 16 million tons on December 23, 1988 and 20 million tons on January 25, 1989. Total USSR purchases of U.S. wheat and corn for shipment during this thirteenth year of the period covered by Long Term Grain Agreements between the U.S. and the USSR have risen to a record 19.3 million tons. The consultation level was raised reflecting expectations of additional USSR purchases, since several months remain before the end of the current year.

#### LIVESTOCK SHOWS FEW IMPROVEMENTS

Despite the usually mild 1988/89 winter, the performance of the livestock sector was up only marginally in January-March 1989 compared to the same period in 1988. Output of meat (liveweight) reportedly rose less than 1 percent to about 5.7 million tons, milk production increased about 2 percent to 17.6 million, and production of eggs rose 1 percent to 15.8 billion pieces. Reduced production of feeds in 1988 largely accounted for the poor showing. Coarse grain production in 1988 was down 14 percent from 1987, potato output fell sharply by 17 percent, output of feed roots decreased 4 percent, and corn silage and green chop production dropped 7 percent. As of April 1, 1989, cattle inventories on state and collective farms decreased 2 percent compared to a year ago, while hog numbers rose about 1 percent.

#### FERTILIZER PRODUCTION DOWN IN FIRST QUARTER

Soviet mineral fertilizer production during the first quarter of 1989 totaled 9.2 million tons, down 1 percent from the same period in 1988. This follows a drop in total mineral fertilizer deliveries to farms in 1988 of about 300,000 tons from 1987's deliveries of 27.1 million. Application of fertilizers to small grains in 1988 was unchanged from 1987, in contrast to the annual rise in application during the preceding 6 years.

#### 1988/89 UPDATE

Since the USSR Grain Situation and Outlook was last released in February 1989 a number of changes have been made in 1988/89 data. Official 1988 grain production data have been received. USSR grain buying activity has exceeded expectations. The estimate of domestic use was unchanged, however, wheat stocks are projected to decline by 2 million tons.

USSR Grain Area, Yield, and Production  
1975-1988, and 1989 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production <u>1/</u> (Million) (Metric Tons)
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Projected)	49.0	1.87	91.5
<u>Coarse Grains 2/</u>			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Projected)	57.0	1.85	105.5
<u>Total Grain 3/</u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Projected)	115.0	1.83	210.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.

2/ Includes rye, barley, oats, corn, sorghum, and millet.

3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1989/90

Year	Production	Trade (Jul/Jun) Imports Exports	Availability 1/ July/June	Total 1/ Metric Tons	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
				Million						
1975/76	140.1	26.1	0.7	166	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	26	6	46	22	123	-14
1980/81	189.1	34.8	0.5	223	25	6	46	28	119	-1
1981/82	158.2	47.3	0.5	205	25	5	47	16	118	-6
1982/83	186.8	34.3	0.5	221	25	5	47	19	118	+7
1983/84	192.2	32.5	0.5	224	26	5	47	21	120	+6
1984/85	172.6	55.5	0.5	228	24	6	47	19	123	+9
1985/86	191.7	29.9	0.5	221	24	5	47	18	126	+1
1986/87	210.1	27.5	0.5	237	25	5	47	23	130	+7
1987/88	211.4	32.0	0.5	243	25	5	47	30	132	+4
1988/89 5/	195.1	38.5	0.5	233	25	5	48	22	135	-2
Projected 1989/90	210.0	33.0	1.0	242	25	5	48	24	140	-2
Total Grains 4/										
	178									
1975/76	66.2	10.1	0.5	76	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	13	2	35	11	53	-12
1980/81	98.2	16.0	0.5	114	13	2	35	15	48	+1
1981/82	81.1	20.3	0.5	101	11	2	36	8	47	-3
1982/83	84.3	20.8	0.5	105	11	2	36	9	43	+4
1983/84	77.5	20.5	0.5	98	11	2	36	9	35	+4
1984/85	68.6	28.1	0.5	96	11	2	36	8	35	+5
1985/86	78.1	15.7	0.5	93	11	1	36	8	36	+1
1986/87	92.3	16.0	0.5	108	11	1	36	10	45	+5
1987/88	83.3	21.5	0.5	104	11	1	36	13	40	+3
1988/89 5/	84.4	15.0	.5	99	11	1	37	10	42	-2
Projected 1989/90	91.5	12.0	1.0	102	11	1	37	10	44	—
Wheat										
	86									
1975/76	65.8	15.6	—	81	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	10	4	7	13	79	+2
1979/80	81.2	18.4	—	100	12	4	7	10	68	-2
1980/81	80.5	18.0	—	98	12	4	7	12	66	-2
1981/82	69.3	26.0	—	95	13	3	7	7	68	-3
1982/83	91.8	12.5	—	104	13	3	7	9	69	+3
1983/84	101.9	11.5	—	113	13	3	7	11	78	+2
1984/85	90.5	26.9	—	117	12	4	7	10	81	+4
1985/86	100.0	13.7	—	114	12	4	7	9	82	—
1986/87	105.9	11.0	—	117	13	4	7	11	80	+2
1987/88	113.7	10.0	—	124	13	4	7	15	84	+1
1988/89 5/	97.5	23.0	—	120	13	4	7	11	85	—
Projected 1989/90	105.0	20.0	—	126	13	4	7	12	90	—
Coarse Grains										
	83									

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

U.S. Wheat and Corn Exports to the USSR  
October-September

Year	Agreement Minimum 1/	Wheat	Corn	Total
1,000 Tons				
1976/77	6,000	3,064	3,052	6,116
1977/78	6,000	3,453	11,132	14,585
1978/79	6,000	3,971	11,530	15,501
1979/80	6,000	2,171	5,768	7,939
1980/81	6,000	3,780	5,738	9,518
1981/82	6,000	6,097	7,772	13,869
1982/83	6,000	2,999	3,208	6,207
1983/84	9,000	7,593	6,476	14,069
1984/85	9,000	2,887 1/	15,750	18,637
1985/86	9,000	153 1/	6,808	6,961
1986/87	9,000	4,081	4,102	8,183
1987/88	9,000	9,046	5,528	14,574
1988/89 2/	9,000	4,310	14,998	19,308

1/ For the 1976/77-1982/83 period the minimum specified was approximately 3 MMT wheat and 3 MMT corn; since 1983/84 the minimum includes 4 MMT wheat and 4 MMT corn.

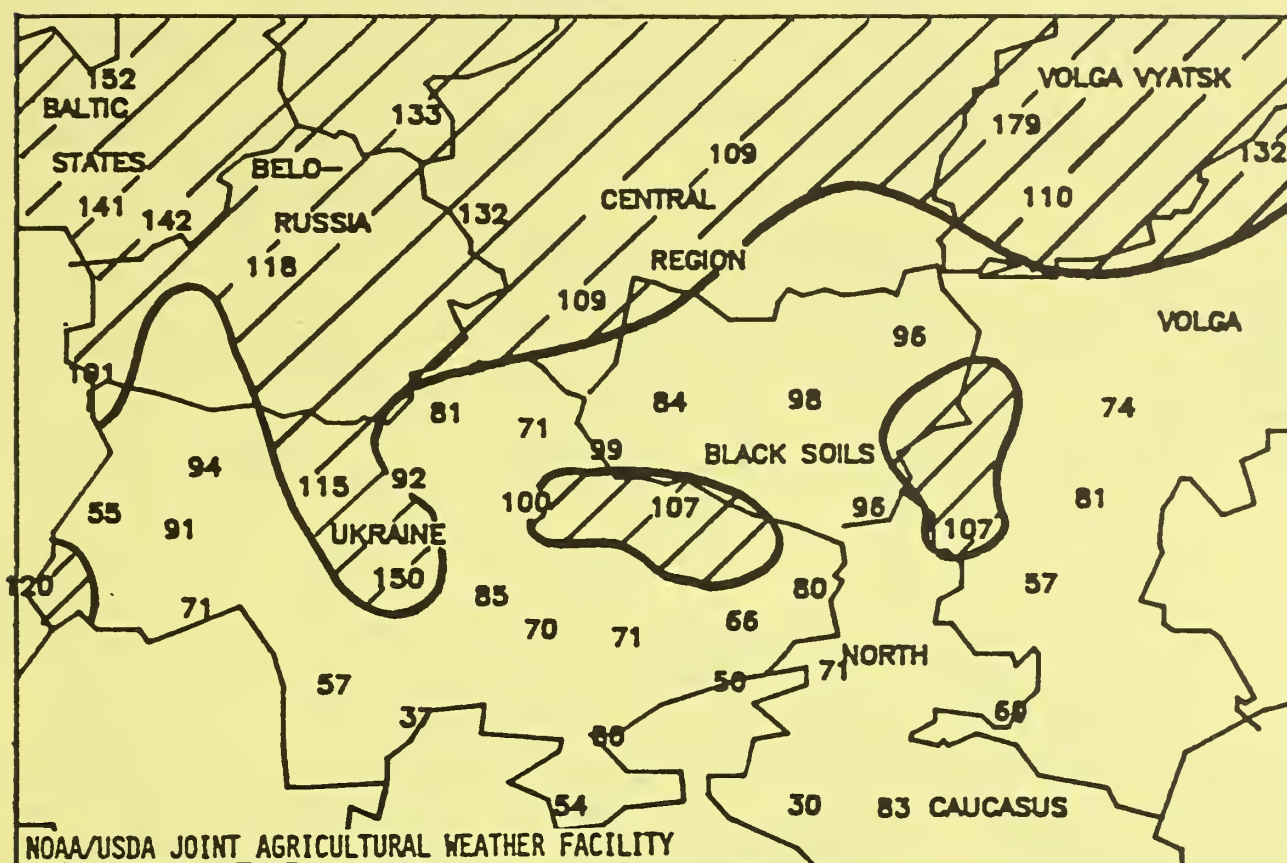
2/ Through May 7, 1989.

USSR: GRAIN AREA, YIELD AND PRODUCTION 1988

	AREA Million hectares	YIELD Ton/Ha	PRODUCTION Million tons
Winter Wheat	18.313	2.98	54.495
Spring Wheat	29.745	1.01	29.950
Total	48.058	1.76	84.445
Winter Barley	1.616	2.86	4.617
Spring Barley	28.116	1.42	39.846
Total	29.732	1.50	44.463
Rye	10.115	1.84	18.517
Oats	10.946	1.40	15.287
Corn	4.431	3.61	16.030
Millet	2.615	1.21	3.171
Total	57.839	1.69	97.468
Buckwheat	1.664	.63	1.073
Rice	671	4.27	2.866
Pulses	6.430	1.38	8.915
Miscellaneous	250	1.17	292
Total	9.015	1.46	13.146
Winter Grains	30.044	2.58	77.629
Spring Grains	84.868	1.38	117.430
Total	114.912	1.70	195.059

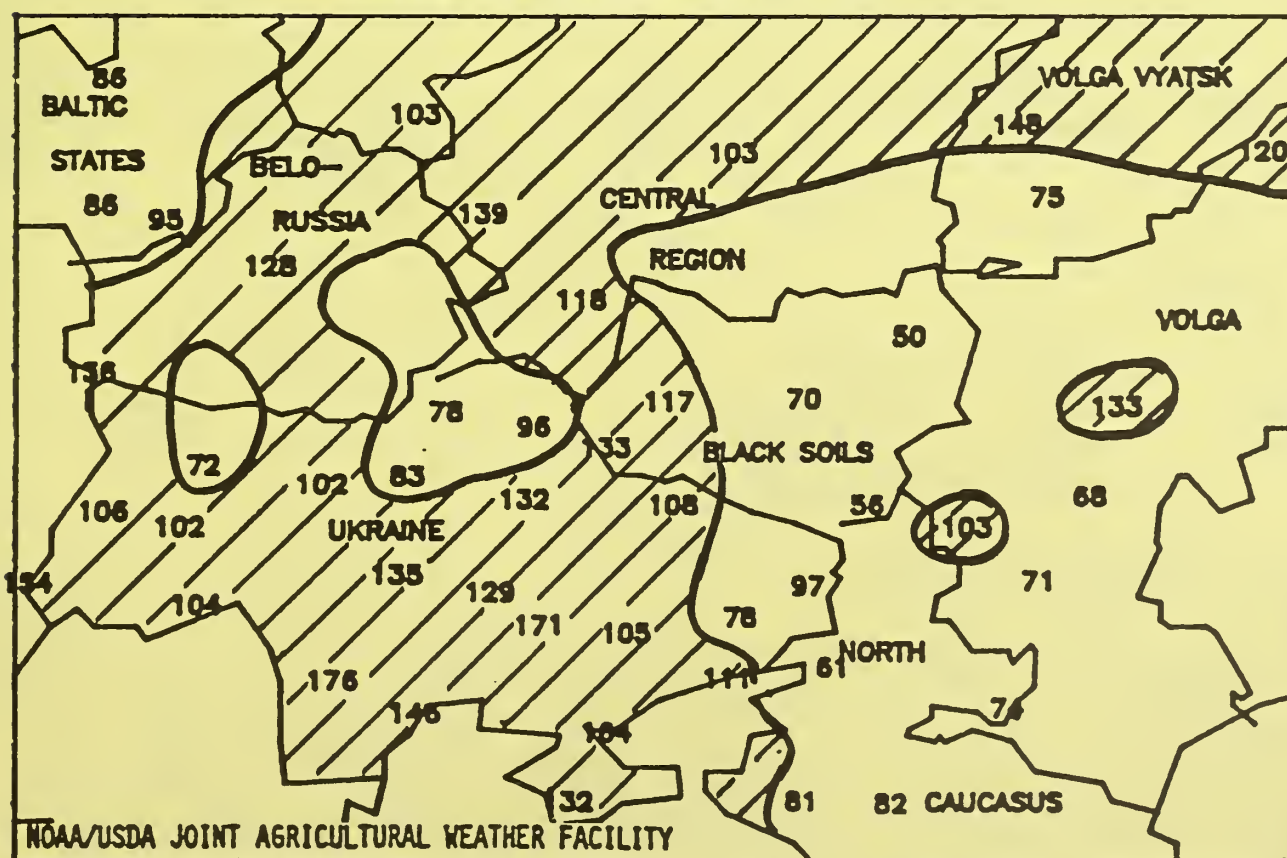
# WESTERN USSR: FEBRUARY – APRIL, 1989

PERCENT OF NORMAL PRECIPITATION



# WESTERN USSR: FEBRUARY – APRIL, 1988

PERCENT OF NORMAL PRECIPITATION



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SG 1-89

February 1989

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# USSR Grain Situation and Outlook

12.3.89  
12.3.89  
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The Soviet Union's 1988 plan fulfillment report, released on January 21, 1989, reported a grain crop of 195 million metric tons with an average yield of 1.7 tons per hectare. This is the smallest grain crop since 1985 when 191.7 million tons were produced. Corn and total wheat were the only major grain production figures published. The grain production figures reported are as follows: corn-for-grain, 16.0 million tons; total wheat, 84.5 million; and rice, 2.9 million. No area data were released in this report.

The USDA production estimates of wheat, coarse grains, and miscellaneous grains were changed in order to reflect the new official Soviet grain production figures. Further adjustments will be made as more detailed official Soviet data is released.

## Weather and Crop Developments

January precipitation was below normal in the western Baltic States, the Ukraine, and the Black Soils Region, limiting moisture recharge. In contrast, above-normal precipitation over Belorussia, the Central Region, the western Volga, and the North Caucasus helped increase moisture reserves. Unusually mild weather covered the European USSR during most of January, although a brief cold snap during January 2-3 did produce the coldest winter weather this season (minimum temperatures ranged from -20 to -27 degrees Celsius as far south as the southern Ukraine and the North Caucasus). Monthly average temperatures were 6-8 degrees C above normal in northern winter grain areas, and 2-6 degrees C above normal in the south. Although winter grains remained dormant, January's unseasonably warm weather left crop areas in the Baltic States, Belorussia, the Ukraine, and the western North Caucasus without a protective snow cover and caused winter grains to lose some winter hardiness, making them more susceptible to potential winterkill. A moderate to deep snow cover existed over crop areas in the Central Region, the Black Soils Region, the Volga Vyatsk Region, and the upper Volga. On January 20, reports indicated the presence of a persistent ice crust in most of Estonia, eastern Latvia, eastern Belorussia, the northern and eastern Ukraine, the southwestern Black Soils Region, the northern North Caucasus, and the lower Volga. Since early February, unseasonably warm weather continued over most of the European USSR.

### Import Estimate Increased

The estimate of USSR grain imports for July-June 1988/89 has been increased to 36 million tons, up a million from a month earlier and 5 million above the estimate included in the most recent USSR Grain Situation and Outlook Report published in November 1988. USSR coarse grains imports are currently projected at 22 million tons, up one million from a month earlier. The estimate of wheat imports continues at 13 million tons, with rice, pulses and miscellaneous grains accounting for the balance.

USSR grain buying activity slowed some over the past month with purchases from all origins now estimated at over 26 million tons - - nearly two thirds the projected total imports of 36 million. Wheat purchases are estimated at around 10 million tons while coarse grain purchases have risen to 16 million. Recent reports have indicated that the Soviets are experiencing increased problems in moving grain internally. Consequently, shippers have encountered increased unloading delays at a number of ports.

The Soviets continue to favor coarse grains from the world market as they step up efforts to cover the shortfall in this year's crop. Corn continues to dominate USSR coarse grain buying activity. Purchases of U.S. corn for delivery during July-June 1988/89 total around 12 million tons. China is expected to sell the USSR up to 1.5 million tons, as well. Weather continues to plague Argentina's corn crop, raising questions about how much they will have to sell to the USSR when new crop becomes available in April. However, total USSR corn imports are still expected to be the heaviest since the record 1984/85 import year. USSR barley purchases are approaching 3 million tons, with the EC expected to account for over 90 percent of the total.

So far during 1988/89, the EC has been the largest wheat seller to the USSR with sales to date of nearly 4 million tons. However, the status of EC wheat sales to the USSR is currently surrounded with uncertainty given the problems associated with some of these sales. Reports have indicated that sales of 1.5 million tons have now been delayed indefinitely and may even be cancelled. The United States and Canada follow the EC with sales of approximately 2 million tons each to the USSR. A recent report indicates that Argentina may have sold the USSR around 250,000 tons. Australia has not reported any wheat sales to the USSR from the newly harvested crop. Given relatively tight wheat supplies and current export commitments to other destinations, there is a good possibility that neither Argentina or Australia will make significant sales to the USSR in 1988/89.

### Domestic Grain Use and Stock Estimates Changed

Since the USSR circular was last released in November 1988, a smaller crop estimate and increased imports have resulted in a number of changes in the supply-demand balance for total grains. Over the period, the estimate of

domestic grain use has been increased to 234 million tons as grain for feed use has increased to a record 135 million tons. The increased import estimate has not completely offset the reduced crop estimate; consequently the USSR is expected to draw on stocks accumulated in recent years in order to meet 1988/89 utilization.

#### U.S. - USSR Long Term Agreement Extended

The United States and the Soviet Union on November 28, 1988 extended their second five-year grain agreement through December 31, 1990. The extended agreement commits the Soviets to annual purchases of at least 4 million tons of wheat, 4 million tons of corn, and an additional 1 million tons of wheat, corn, soybeans and/or soybean meal, with each ton of soybeans or meal counting as two tons of grain. The agreement provides that the Soviet Union may increase the 9 million ton quantity by as much as 3 million tons of wheat and/or corn for shipment without prior consultations. The United States increased the consultation level first to 16 million tons on December 23, 1988 and then to 20 million tons on January 25, 1989. This means that the Soviet Union is permitted to buy up to 20 million tons of U.S. wheat and corn for shipment during the 12-month period which began Oct. 1, 1988, without further consultations.

#### Livestock Product Output Shows Further Gains in 1988

Soviet output of livestock products rose again in 1988, with reported per capita consumption of meat and meat products at 65 kilograms, up 1 percent from 1987. The production of meat and eggs rose by 2 percent, and milk production was up 3 percent compared to the year earlier. Average milk yields per cow in the socialized sector reportedly increased by 4 percent to 2,799 kilograms in 1988, and egg yields rose 2 percent to 232 eggs per head.

#### USSR: Livestock Production on All Farms, Calendar Years 1983-88

Product	1983	1984	1985	1986	1987	1988
	1,000 tons					
Meat, carcass weight	16,449	16,985	17,131	18,057	18,940	19,300
Milk	96,463	97,906	98,608	102,173	103,774	106,400
Eggs, million pieces	75,110	76,482	77,255	80,746	82,737	84,600

The decline in animal inventories slowed slightly in 1988 compared to 1987. Hog numbers which fell 3 percent in 1987 actually rose slightly last year. The 1 percent decline in cattle and cow inventories, however, was the same as in 1987. Poultry numbers are estimated to be up by about 1 percent.

USSR: Livestock Inventories on All Farms,  
January 1, 1983-1989

Product	1983	1984	1985	1986	1987	1988	1989
	million head						
Total cattle	117.2	119.6	121.0	120.9	122.1	120.6	118.8
of which, cows	43.8	43.9	43.6	42.9	42.4	42.0	41.5
Hogs	76.6	78.7	77.9	77.8	79.5	77.4	77.7
Sheep & Goats	148.5	151.8	149.2	147.3	148.7	147.3	145.9
Poultry	1104.5	1126.1	1143.0	1165.5	1174.0	1175.0	1190.0

USSR Grain Area, Yield, and Production  
1975-1987, and 1988 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production <sup>1/</sup> (Million) (Metric Tons)
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988 (Projected)	49.0	1.72	84.5
<u>Coarse Grains <sup>2/</sup></u>			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988 (Projected)	57.0	1.69	96.5
<u>Total Grain <sup>3/</sup></u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988 (Projected)	115.0	1.70	195.0

<sup>1/</sup> "Bunker weight" basis; not discounted for excess moisture or foreign material.

<sup>2/</sup> Includes rye, barley, oats, corn, sorghum, and millet.

<sup>3/</sup> Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

Year	Production	Trade (Jul/Jun)		Availability 1/ July/June	Total 1/ (Million Metric Tons)			Industrial	Food	Dockage/ Waste 2/		Feed	Stock Change 3/ July/June
		Imports	Exports		Total 1/ (Million Metric Tons)								
					Total Grains 4/								
1975/76	140.1	26.1	0.7	166	178	25	5	45	14		89	-12	
1976/77	223.8	11.0	3.3	232	220	26	5	45	31		113	+12	
1977/78	195.7	18.9	2.3	212	229	26	5	45	29		124	-16	
1978/79	237.4	15.6	2.8	250	230	25	6	46	28		125	+20	
1979/80	179.2	31.0	0.8	209	223	26	6	46	22		123	-14	
1980/81	189.1	34.8	0.5	223	224	25	6	46	28		119	-1	
1981/82	158.2	47.3	0.5	205	211	25	5	47	16		118	-6	
1982/83	186.8	34.3	0.5	221	214	25	5	47	19		118	+7	
1983/84	192.2	32.5	0.5	224	218	26	5	47	21		120	+6	
1984/85	172.6	55.5	0.5	228	219	24	6	47	19		123	+9	
1985/86	191.7	29.9	0.5	221	220	24	5	47	18		126	+1	
1986/87	210.1	27.5	0.5	237	230	25	5	47	23		130	+7	
1987/88 5/	211.4	32.0	0.5	243	239	25	5	47	30		132	+4	
Projected 1988/89	195.0	36.0	1.0	230	234	25	5	47	22		135	-4	
					Wheat								
1975/76	66.2	10.1	0.5	76	86	13	1	35	7		30	-10	
1976/77	96.9	4.6	1.0	100	92	13	2	35	14		28	+8	
1977/78	92.2	6.6	1.0	98	109	14	2	35	14		44	-11	
1978/79	120.9	5.1	1.5	124	107	13	2	35	14		43	+18	
1979/80	90.2	12.0	0.5	102	114	13	2	35	11		53	-12	
1980/81	98.2	16.0	0.5	114	113	13	2	35	15		48	+1	
1981/82	81.1	20.3	0.5	101	104	11	2	36	8		47	-3	
1982/83	84.3	20.8	0.5	105	101	11	2	36	9		43	+4	
1983/84	77.5	20.5	0.5	98	93	11	2	36	9		35	+4	
1984/85	68.6	28.1	0.5	96	91	11	2	36	8		35	+5	
1985/86	78.1	15.7	0.5	93	92	11	1	36	8		36	+1	
1986/87	92.3	16.0	0.5	108	103	11	1	36	10		45	+5	
1987/88 5/	83.3	21.5	0.5	104	101	11	1	36	13		40	+3	
Projected 1988/89	84.5	13.0	1.0	97	100	11	1	36	10		42	-3	
					Coarse Grains								
1975/76	65.8	15.6	—	81	83	11	4	7	6		56	-2	
1976/77	115.0	5.7	2.0	119	115	11	3	7	16		78	+4	
1977/78	92.6	11.7	1.0	103	108	10	3	7	14		74	-5	
1978/79	105.4	10.0	1.0	114	112	10	4	7	13		79	+2	
1979/80	81.2	18.4	—	100	102	12	4	7	10		68	-2	
1980/81	80.5	18.0	—	98	101	12	4	7	12		66	-2	
1981/82	69.3	26.0	—	95	98	13	3	7	7		68	-3	
1982/83	91.8	12.5	—	104	101	13	3	7	9		69	+3	
1983/84	101.9	11.5	—	113	112	13	3	7	11		78	+2	
1984/85	90.5	26.9	—	117	114	12	4	7	10		81	+4	
1985/86	100.0	13.7	—	114	114	12	4	7	9		82	—	
1986/87	105.9	11.0	—	117	115	13	4	7	11		80	+2	
1987/88 5/	113.7	10.0	—	124	123	13	4	7	15		84	+1	
Projected 1988/89	96.5	22.0	—	118	119	13	4	7	11		84	-1	

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

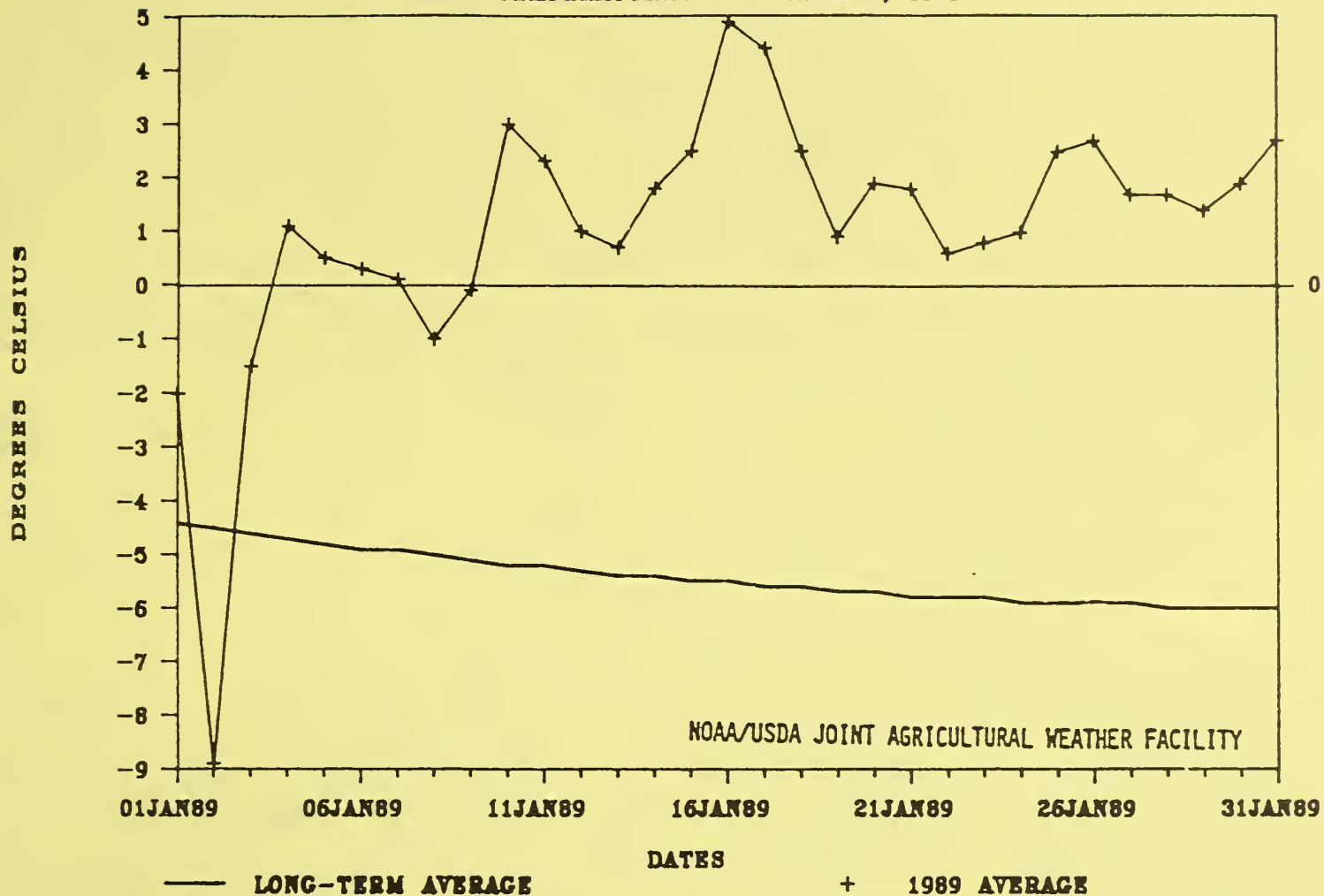
3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

# BALTICS & BELORUSSIA

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